

PowerTrack Asset / Tool Management

User's Guide for Desktop Application

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System Description

Overview

PowerTrack Asset Management utilizes a ready-to-run SQL server database to maintain assets (for example, equipment and tools), as well as materials (for example, consumable items). The primary user interface is the Desktop Asset Management application, which requires an online network connection with the server.

Transactions such as check-out, check-in and transfers may be run on the desktop application or a mobile device, such as an Android or iOS device. Mobile device transactions are supported using the PowerTrack Mobile application and can operate while connected or disconnected from the network. Mobile transactions made while disconnected are transmitted to the server when a network connection is re-established. Wireless LAN and Wide Area Connectivity are supported.

Using barcode technology, asset and material movements are recorded to enforce employee/contractor accountability and accurate inventory.

The asset lookup capability in PowerTrack Asset Management allows a user to quickly search on an individual asset number or model number, or filter results based on category, description, manufacturer, sites, assignment (employee/contractor), business unit/department, and condition.

Asset usage can be analyzed by a quick look up of transaction history or through activity reports. Transaction history can be filtered by date range, asset or model number, site, assignment (employee/contractor), business unit/department and by transaction type (check-in, check-out, transfer, new/retired asset).

Tracking Type Classification

All asset models entered into the Asset Management System must be classified as one of the following tracking types:

Unique ID (UID)

Unique ID assets are assigned an identification number (barcode #) that is unique to the individual asset or tool. So the quantity for this identification number will always be one. Unique ID assets can be assigned to an individual and found on an employee or contractor search; they can have a condition, business unit, department, serial number, specific cost, schedule maintenance and return by date – all attributes not available for the other tracking types. In addition, Unique ID assets can be retired, and un-retired.

Item # Quantity (Item-Quantity)

Item-Quantity assets are generally of lesser value, for example hard hats or shovels. A model will be assigned with an Item number (barcode #) that will apply to all specimens of that model. A user must specify the item # and quantity when creating transactions. An item-quantity model

may be stored at multiple sites in various quantities. The system will maintain an average cost for each item quantity model for each site.

Materials

Materials are generally consumables, for example, drill bits, nails, paper towels. A material model will be assigned with an item number (barcode #) that will apply to all specimens of that model. A user must specify the item # and quantity when creating transactions

Unlike the other two tracking types, materials are only maintained at stocking sites – they are removed from inventory when transferred from a stocking site. Material models may be stored at multiple stocking sites in various quantities. The system will maintain an average cost for each material model for each stocking site.

It is recommended when creating Item numbers and UID numbers, to consistently use the same number of digits (for example, 5 or 6) to provide optimal sorting. For example, the sequence 10000 to 99999 will provide 90,000 numbers available for use. Use 6 digit numbers if you require more than this amount of numbers.

Sites Classification

Assets are maintained at sites within the Asset Management System. A site must be classified as either a stocking site (for example, a warehouse or tool room), non-stocking facilities (for example, an office building) or a job site.

Stocking sites and non-stocking facilities may have subsidiary locations (for example aisles, bins or room numbers). Job sites do not have subsidiary locations. *A future release is planned for job sites to have phases/cost codes for job cost charging.*

A site can be set up to be a subsidiary to a stocking site. This designation is solely to allow user permissions to be extended from a stocking site to its subsidiaries (see Site Permissions below)

Users vs. Employees

The Asset Management system allows for an employee (or contractor) assignment to be captured at checkout. As such, an employee list is maintained by the system to be used for asset checkouts to employees.

Users are the people that log into the system and create transactions, perform asset searches or run reports. The Admin will set up a user by first selecting the user from the employee table. A user name and password will be entered. The Admin will assign permissions for the user.

Site Permissions

A user will be allowed to have up to three site permissions, or may be given permissions for all sites. Any of the three sites may be stocking sites. Stocking site permissions extend to any

sites that are set up as subsidiaries of it. So a user with a stocking site permission will be able to transfer assets to or from that stocking site and any of its subsidiary sites.

Roles Permissions

A user will be assigned to one of the four roles available in the system. Each role can be customized by the Admin to have permissions for certain Asset Management functions.

Getting Started

Global Options

Setup Global Options by selecting the **Admin** button on the Asset Management toolbar. Select the **Global Options** tab.

The screenshot shows the 'Administration View' window with the 'Global Options' tab selected. The window has a menu bar with 'File' and 'Help'. Below the menu bar is a toolbar with icons for Home, Tools, Materials, Model Catalog, Transactions, Reports, List Management, Cycle Count, and Admin. The 'Global Options' tab is active, showing a 'Save' button and a 'Company Name' field with the value 'Compsee'. Below this are three sections: 'Record Description' with two radio buttons (Tool selected), 'Cost Codes and Phases' with three radio buttons (None selected), and 'Options' with checkboxes for 'Employee User-defined Field 1', 'Employee User-defined Field 2', 'Contractor Usage' (checked), and 'SAP Interface'.

- Type the **Company Name**.
- Select the **Record Description** by choosing Tool or Asset - to change references throughout the application to the selected description.

The example screens in this user guide assume that Tool is checked.

- **Cost Codes and Phases** must be set to **None**. This is for future use.
- Clicking on the **Employee User-defined Field 1 or 2** will set up additional fields in the Employee profile and associated selection lists.
- Clicking on **Contractor Usage** will allow for checking out assets to contractors in addition to employees.
- Do not use **SAP Interface** – this is a custom interface for a SAP customer
- Select the **Save** button to save the Global Options.

List Management

PowerTrack Asset Management supports list management for Employees, Contractors, Business Units, Departments, Sites\Locations, Categories, Manufacturers, Vendors, Conditions, Acquisition Method (ACQ) and Unions. These lists allow the user to make selections throughout the application.

CAUTION: Deleting a list item will result in the loss of all historical data for that item. Deactivate a list item by setting the item to inactive to preserve the integrity of the system for reporting and searching.

NOTE: Use ID numbers containing the same number of digits to allow for accurate alphanumeric sorting.

Employees Management

Create, edit or delete employees by selecting the **List Management** button on the Asset Management toolbar and select the **Employees** tab.

List Maintenance - Employees

File Help

Home Tools Materials Model Catalog Transactions Reports **List Management** Cycle Count Admin

Employees CNTR Bus. Units Depts Sites/Locs Categories MFRs Vendors Conditions ACQ Unions

Search

Employees

Number	Name
101043	Anderson, Paul
100641	Anolik, Eric, 1
100490	Aronne, Armand, 1
101055	Banzhaf, Peter
100546	Barbarita-Sarubbi, Grace, 1
100106	Barbera, Robert
101445	Barclay, Brian, 1
100568	Barger, Brian, 1
100111	Barrett, Kevin
temp10	Bautista, Leonel
100240	Bergman, Valerie
100215	Bharadwaj, Sanjay
101323	Bisceglia, Michael
100198	Boniello, Jared, 1
100993	Bossa, Christopher, 1
101922	Bracken, Thomas

Count=50 ☐ Show Inactive

Employees

John Alicandri **Emp ID:** 100108

Prox ID:

Email:
jalicandri@hunterrobertsco.com
johnalicandri@gmail.com
(566) 656-6656 Work
(987) 689-9767 Home

Female
Minority=No
Veteran=No

Address:

NM

Business Unit:
HQ

Department:
Office Services

Notes

New Employee Record

- Select the **New** button to create a new employee. A blank view screen will display.

List Maintenance - Employees

File Help

Home Tools Materials Model Catalog Transactions Reports List Management Cycle Count Admin

Employees CNTR Bus. Units Depts Sites/Locs Categories MFRs Vendors Conditions ACQ Unions

Search [] Clear

+ New

Employees

Number	Name
101043	Anderson, Paul
100641	Anolik, Eric, 1
100490	Aronne, Armand, 1
101055	Banzhaf, Peter
100546	Barbarita-Sarubbi, Grace, 1
100106	Barbera, Robert
101445	Barclay, Brian, 1
100568	Barger, Brian, 1
100111	Barrett, Kevin
temp10	Bautista, Leonel
100240	Bergman, Valerie
100215	Bharadwaj, Sanjay
101323	Bisceglia, Michael
100198	Boniello, Jared, 1
100993	Bossa, Christopher, 1
101922	Bracken, Thomas

Count=50 ☐ Show Inactive

Employees

☒ Save

Emp ID: [200323] ☒ Active Badge/Prox ID: [35432]

First: [John] Middle: [C] Last: [Calhoun]

Contact Address Certificates Unions

Email (work): []

Email (home): []

Phone: [] [N/A] [] [Work]

Business Unit: []

Department: []

Site: []

Gender
☐ Male
☐ Female

Minority
☐ Yes
☐ No

Veteran
☐ Yes
☐ No

- Enter the **Emp ID** number.
- The **Active** box will be checked by default.
- Enter a **Badge or Proximity ID**, if using badges.
- Enter the **First, Middle and Last** name of the employee.
- Select the **Load Photo** button to search for and select a photo of the employee.

Contact Information *(optional information for your reference only – not used by the system)*

- Enter the Work and Home **Email** address of the employee.
- Enter the **Phone** number of the employee. Use the drop down menu to select the type of phone connection. Enter any additional **Phone** numbers and select the type of phone connection.
- Use the drop down lists to select the employee's **Business Unit** and **Department**
- Use the drop down list to select the **Site** location – if it is beneficial to identify the employee with a primary site
- Select the appropriate radio button for the **Gender**, **Minority** and **Veteran** selection.

- The last two fields are customer definable and will only appear if the global option is set for this feature.

Address Information *(optional information for your reference only – not used by the system)*

- Select the **Address** tab to display a blank view screen.
- Type the **Address** and **City** of the employee..
- Use the drop down list to select the **State** of the employee.
- Type the **Zip** Code of the employee.
- Type any additional **Notes** regarding the address of the employee.
- Select the **Cancel** button to exit the record without saving the employee information or the **Save** button to Save the Employee.
- Select the **Save – Add New** button to save and add additional employees.

List Maintenance - Employees

File Help

Home Tool Lookup Model Catalog Transactions Reports List Management Cycle Count Admin

Employees CNTR Bus, Units Depts Sites/Locs Categories MFRs Vendors Conditions ACQ Phases Unions

Search [C] New

Employees

Number	Name
879998	Zerxes, Winston,
100101	Wilson, Wendall,
413224	Wilkerson, Dan, d
999999	The Administrator of System, Admin,
539222	Smith, Lester,
102334	Simpson, John,
593999	Rambler, Ronald,
100483	Milbern, Cecily,
878897	Midlands, Thomas,
311111	Kapp, Mike , C
510004	Johnson, Michael, A
112222	Hildebrand, Brad, A
212212	Graham, Kyler, b
823232	Gerla, Tom, G
500233	Garcia, Nidia, C
123432	Clements, Bill

Count=22 ☐ Show Inactive

Employees Delete

Save Save - Add New Cancel Delete

Emp ID: 12646 ☒ Active Badge/Prox ID: 10003

First: John Middle: C Last: Calhoun Load Photo

Contact Address Certificates Unions

Address: 154 Main Street Suite 343

City: Johnson City

State: CA Zip: 98432

Notes: This is a note

Certification Information

The **Certificates** tab is used to track personal employee information and certifications required. This screen can be configured specific to each customer. If the certificate date fields are used, the **Expired Certificates Report** will show all certificates that are expired.

Search and Edit Employee Record

Employee List

- Only the first 50 employees are shown in the employee list view for optimum load times
- Sort the employees list by selecting **Number** to sort by employee ID or **Name** to sort by employee name. Select the employee Number or Name and the record summary will display in the right hand view screen.

Search

- Use the Search function to search for employees by Last Name or Employee ID. Partial data is acceptable - type the first few characters and press **Enter or the search icon button**. Use the **Clear** button to clear the search criteria and display all the records. Note, the search function will also match on badge ID if the full badge ID is entered.
- Click to check the **Show Inactive** box to show inactive employees in the list display and to search inactive employees

Edit

- Select an employee in the list and click the **Edit** button to make changes to the record.
- Select the **Contact**, **Address**, **Certificates** or **Unions** tab to make changes to the appropriate fields.
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Delete** button to delete the item record. Select the **OK** button.

If the employee has already been used, including in transactions, it is better to make the employee Inactive, so as not to cause blank assignment information in history records.

Click to uncheck the **Active** box to set the record to inactive.

- Select the **Save or Save-Add New** button to save the changes.
- Select the **Save – Add New** button to save and add additional employees.

Contractor Management (Optional)

The **Contractor** (CNTR) management is similar to the **Employees** management, with a few exceptions:

The Contractor list shows the Identification Number and Name for the Contractor Employee as well as the Contractor company.

The Business Unit and Department selections are replaced with **Contact** – which is to designate the company employee who is the best contact for this contractor.

Number	Name	Company
CELSHE00	Jeremiah, Marisa	Celtic Sheet Meta
CELSHE00-001	Barbera, John	Celtic Sheet Meta
CELSHE00-002	Balestrieri, Joseph	Celtic Sheet Meta
CELSHE00-003	Lovett, William	Celtic Sheet Meta
CELSHE00-004	Krynicky, Michael	Celtic Sheet Meta
CELSHE00-005	Hargaden, Thomas	Celtic Sheet Meta
CELSHE00-006	Rempel, Brian	Celtic Sheet Meta
CELSHE00-007	Gomez, Blay	Celtic Sheet Meta
CELSHE00-008	Cortes, Lou	Celtic Sheet Meta
CELSHE00-009	Johnson, Sam	Celtic Sheet Meta
CELSHE00-010	Potter, Gary	Celtic Sheet Meta
CELSHE00-011	Jones, Stanley	Celtic Sheet Meta

New Contractor Company

- To set up the first employee for a new contractor company, click the **New** button and enter the Contractor ID and the information related to their first employee in the right-hand window.
- Select **Save** to save the contractor employee or **Save-Add New** to save and enter a New Contractor company.

Adding More Employees to the Contractor Company

- The system will create contractor numbers for the second and all subsequent employees for a contractor company by adding a suffix to the contractor ID established for the first contractor employee. In the example shown, CELSHE00 was the ID created by the user for the contractor and first employee. The system will create a contractor number for each subsequent employee for that contractor as CELSHE00-001, CELSHE00-002, and so on.
- To add another employee to an existing contractor, select one of the records for the contractor and click the **Edit** button
- Select the New Contractor Employee button.
- Once selected, the Contractor ID number will change to the next sequential number for that contractor as shown in the example below:

List Maintenance - Contractors

File Help

Home Tools Materials Model Catalog Transactions Reports List Management Cycle Count Admin

Employees CNTR Bus. Units Depts Sites/Locs Categories MFRs Vendors Conditions ACQ Unions

celshe Clear

+ New

Contractors

Number	Name	Company
CELSHE00	Jeremiah, Marisa	Celtic Sheet Meta
CELSHE00-001	Barbera, John	Celtic Sheet Meta
CELSHE00-002	Balestrieri, Joseph	Celtic Sheet Meta
CELSHE00-003	Lovett, William	Celtic Sheet Meta
CELSHE00-004	Krynicky, Michael	Celtic Sheet Meta
CELSHE00-005	Hargaden, Thomas	Celtic Sheet Meta
CELSHE00-006	Remppe, Brian	Celtic Sheet Meta
CELSHE00-007	Gomez, Blay	Celtic Sheet Meta
CELSHE00-008	Cortes, Lou	Celtic Sheet Meta
CELSHE00-009	Johnson, Sam	Celtic Sheet Meta
CELSHE00-010	Potter, Gary	Celtic Sheet Meta
CELSHE00-011	Jones, Stanley	Celtic Sheet Meta

Count=12 ☐ Show Inactive

Contractors

☒ Save

Contr. ID: CELSHE00-012 ☒ Active Badge/Prox ID:

First: Middle: Last:

Contract Address Certificates N/A

Company: Celtic Sheet Metal Inc. Gender: ☐ Male ☐ Female

Email (work):

Email (home):

Phone: (845) 267-3400 Work N/A

Contact:

Site:

Minority: ☐ Yes ☐ No

Veteran: ☐ Yes ☐ No

- Enter the contractor employee information and select **Save** to save the record or **Cancel** to exit without saving.

Business Unit Management (Optional)

Create, edit, or delete business units by selecting the **List Management** button on the Asset Management toolbar and select the **Business Units** tab.

The screenshot shows the 'List Maintenance - ManagementUnit' application window. The 'List Management' button is selected in the top toolbar. The 'Bus. Units' tab is active in the sub-menu. On the left, there is a search bar and a 'New' button. Below the search bar is a list of business units: CA, FL (selected), HI, HQ, NJ, NY, and PA. At the bottom left, there is a 'Show Inactive' checkbox. On the right, the 'Business Units' form is displayed. It includes buttons for 'Save', 'Save - Add New', 'Cancel', and 'Delete'. The 'Description' field contains 'FL'. The 'Active' checkbox is checked. A warning message is displayed below the 'Active' checkbox: 'You can only Delete a record that has not been used before. If you are not sure you can attempt to delete and if it is in use the system will check for you. If you wish to deactivate a record, you can set the record to inactive. Changing a record to inactive will preserve the integrity of your system for reporting and searching, however editing a record that is using a inactive list item will be empty and you will need to adjust the list item before a save will be permitted.'

- Select the **New** button to create a new business unit. A blank view screen will display.
- Type the **Description** of the business unit.
- The **Active** box will be checked by default.
- Select the **Cancel** button to exit the record without saving the business unit record, the **Save** button to save the record, and the **Save - Add New** button to save the business unit record and create another new record.

Edit Business Unit Record

- Use the Search function to search for existing business units by Name.
- Click to check the **Show Inactive** box to show inactive business units in the search.
- Select the business unit Name and the record will display in the right-hand View Screen.
- Click to uncheck the **Active** box to deactivate the record.
- Select the **Cancel** button to exit the record without saving the business unit record.

- Select the **Save** or **Save – Add New** button to save the business unit record.
- Select the **Delete** button to delete the item record.

If the Business Unit has already been used, including in transactions, it is better to make it Inactive, so as not to cause blank information in history records.

Departments Management (required with Business Unit Management)

Create, edit or delete departments by selecting the **List Management** button on the Asset Management toolbar and select the **Departments** tab.

New Department Record

- Use the drop down list to select the **Business Unit** from the Business Units List Management database.
- Select the **New** button to create a new department. A blank view screen will display.
- Enter the Department **Number** and **Department** name.
- The **Active** box will be checked by default.

- Use the drop down list to select the **Department Manager** from the Employees List Management database.
- Select the **Cancel** button to exit the department record without saving, the **Save** button to save the record or **Save - Add New** to save the record and create another new record.

Edit Department Record

- Use the drop down list to select the **Business Unit Filter**.
- Use the Search function to search for existing departments by Number or Name.
- Click to check the **Show Inactive** box to show inactive departments in the search.
- Departments are sorted by department **Name**. Select the department Name on the left and the record will display in the right-hand View Screen.
- Select the **Edit** button to make changes to the record.
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Delete** button to delete the item record. Select the **OK** button.
If the Department has already been used, including in transactions, it is better to make it Inactive, so as not to cause blank information in history records.
- Select the **Save** button to save the changes or **Save - Add New** to save the department record and create another new record.

Sites Management

Create, edit or delete sites by selecting the **List Management** button on the Asset Management toolbar and select the **Sites\Locations** (Sites/Locs) tab.

New Site

- Select the **New** button to create a new site. A blank view screen will display.
- Enter the **Site ID** number. The **Active** box will be checked by default.
- Enter the Site **Description** name.
- Use the drop down list to select the **Site Type** – either Stocking Site, Job Site or Non-stocking Facility Site
- Use the drop down list to select the **Primary Stocking Source** / Hierarchical parent. This will be used solely to extend user permissions from a stocking site to its “children” sites.
(if all users are given permissions for All sites, then this selection can be ignored)
- Use the drop down list to select the **Business Unit** *(this is used only for reference purposes where a site can be associated to a single business unit.)*
- Enter the **Address, City, State, Zip Code** and **Phone** number of the site.
- Use the drop down list to select the **Employee Contact** from the Employees List.

- Select the **Cancel** button to exit the record without saving the changes or **Save** or **Save – Add New** to save the changes.

Edit Site Record

- Use the Search function to search for existing sites by Site Description.
- Click to check the **Show Inactive** box to show inactive sites in the sites list and search.
- Sites are sorted by Site Description. Select the Site Description on the left and the record will display in the right-hand View Screen.
- Select the **Edit** button to make changes to the site record.
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Delete** button to delete the item record.

If the Site has already been used, including in transactions, it is better to make it Inactive, so as not to cause blank information in history records.

Click to uncheck the **Active** box to set the record to inactive.

- Select the **Save** button to save the changes or **Save - Add New** to save the site record and create another new record.

Add Location Records

Select the **List Management** button on the Asset Management toolbar and select the **Sites\Locations** (Sites/Locs) tab.

NOTE: Locations are locations within a site. For example, a warehouse could be the site and Bin A15 could be a location within this site. Sites classified as Jobs do not have locations.

- Select the Site **Description** on the left panel and the record summary will display in the View Screen.
- Select the **View/Edit Locations** button to display all locations (note that this button is inactive for job sites).
- The locations list for the selected site is displayed in the left panel. The site is identified at the top of the list. The summary view for the selected record is displayed in the right panel.

List Maintenance - Locations

File Help

Home Tools Materials Model Catalog Transactions Reports **List Management** Cycle Count Admin

Employees CNTR Bus. Units Depts **Sites/Locs** Categories MFRs Vendors Conditions ACQ Unions

Search [] Clear

+ New

Locations For Site: W50, Warehouse 50

Location	Description
A10	Aisle 10
A11-B2	Aisle 11- Bin 2
A13-B5	Aisle 13, Bin 5

Count=3 ☐ Show Inactive

Locations

Edit Save - Add New Cancel Print Delete

Location For

W50 Warehouse 50

Sub Location A10 **Bar Code** A10

Description
Aisle 10

Back to Site

- Select the **Back to Site** button to return to the Sites View with the site still selected, or select the **Cancel** button to return to the Sites View with the default (first) site selected.
- **Select the New** button to create a new location for the selected site. A blank screen will display in the right panel.

- Type the **Location ID** and the **Bar Code ID** (if applicable) for the location.
- Type the **Description** of the location.
- Select the **Cancel** button to exit the record without saving the new location record.
- Select the **Save** button or **Save - Add New** to save the changes.

List Maintenance - Locations

File Help

Home Tools Materials Model Catalog Transactions Reports List Management Cycle Count Admin

Employees CNTR Bus. Units Depts Sites/Locs Categories MFRs Vendors Conditions ACQ Unions

Search [] Clear

Locations For Site: W50, Warehouse 50

Location	Description
A10	Aisle 10
A11-B2	Aisle 11- Bin 2
A13-B5	Aisle 13, Bin 5

Count=3 ☐ Show Inactive

Locations

Save Save - Add New Cancel Delete

Location For Warehouse 50

Location [A15-B1] Bar Code [A15-B1]

Description [Aisle 15, Bin 1]

- Select the **Edit** button to make changes to the location record. The editable record will be displayed in the right panel.
 - Select and change the **Location**, **Bar Code** or **Description** fields to make changes to the record.
 - Select the **Cancel** button to exit the record without saving the changes.
 - Select the **Delete** button to delete the item record.

If the Location has already been used, including in transactions, it is better to make it Inactive, so as not to cause blank information in history records.

Click to uncheck the **Active** box to set the record to inactive.
- Select the **Save** button or **Save - Add New** to save the changes.

Categories Management

Create, edit, or delete categories by selecting the **List Management** button on the Asset Management toolbar and select the **Categories** tab.

- Toggle the radio button between Asset (Tool) and Material to view the respective Categories List

List Maintenance - Categories

File Help

Home Tools Materials Model Catalog Transactions Reports **List Management** Cycle Count Admin

Employees CNTR Bus. Units Depts Sites/Locs **Categories** MFRs Vendors Conditions ACQ Unions

Search [] [C] [New]

☒ Tool ☐ Material

Categories

Description
Air Card
Cement Mixers
Compressor
Desktop
Digital Camera
Drills, Hand
Generator
Handheld Device
Keyboard
Laptops
Mobile Phone
Monitor
Mouse

☐ Show Inactive

Categories [Print]

[Save] [Save - Add New] [Cancel] [Delete]

Description: [Air Card]

Active: ☒

You can only Delete a record that has not been used before.
If you are not sure you can attempt to delete and if it is in use the system will check for you.
If you wish to deactivate a record, you can set the record to inactive.
Changing a record to inactive will preserve the integrity of your system for reporting and searching, however editing a record that is using a inactive list item will be empty and you will need to adjust the list item before a save will be permitted.

- Select the **New** button to create a new category. A blank view screen will display in the right panel.
- Type the **Description** of the categories. The **Active** box will be checked by default.
- Select the **Cancel** button to exit the record without saving the category record.
- Select the **Save** button to save the category record or **Save - Add New** button to save the category record and create another new record.

Edit Category Record

- Use the Search function to search for existing categories by Name.
- Click to check the **Show Inactive** box to show inactive categories in the search.
- Select the category in the list and the record will display in the right panel.

- Type changes to the **Description** field.
- Select the **Cancel** button to exit the record without saving the category record.
- Select the **Delete** button to delete the item record.
 If the Category has already been used, including in transactions, it is better to make it Inactive, so as not to cause blank information in history records.
 Click to uncheck the **Active** box to set the record to inactive.
- Select the **Save** button or **Save - Add New** to save the category record.

Manufacturers Management

Create, edit or delete manufacturers by selecting the **List Management** button on the Asset Management toolbar and select the **Manufacturers (MFRs)** tab.

- Select the **New** button to create a new manufacturer. A blank view screen will display in the right panel.
- Enter the **Description** name. The **Active** box will be checked by default.
- Select the **Cancel** button to exit the record without saving the manufacturer record.

- Select the **Save** button to save the manufacturer record or **Save - Add New** to save the manufacturer record and create another new record.

Edit Manufacturer Record

- Use the Search function to search for manufacturers by Name.
- Click to check the **Show Inactive** box to show inactive manufacturers in the display list and the search.
- Select the Name in the list and the record will display in the right panel.
- Select and change the **Description** field to make changes to the record.
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Delete** button to delete the item record.

If the Location has already been used, including in transactions, it is better to make it Inactive, so as not to cause blank information in history records.

Click to uncheck the **Active** box to set the record to inactive.

- Select the **Save** button to save the changes.
- Select the **Save - Add New** button to save the manufacturer record and create another new record.

Vendors Management

Create, edit, or delete vendors by selecting the **List Management** button on the Asset Management toolbar and select the **Vendors** tab.

- Select the **New** button to create a new vendor. A blank view screen will display in the right panel.
- Enter the **Description** name. The **Active** box will be checked by default.
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Save** button to save the vendor record or the **Save - Add New** button to save the vendor record and create another new record.

Edit Vendor Record

- Use the Search function to search for existing vendors by vendor Name. Click to check the **Show Inactive** box to show inactive vendors in the displayed list and the search.
- Select the Name in the list and the record will display in the right panel.
- Select and change the **Description** field to make changes to the record.
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Delete** button to delete the item record.

If the Vendor is being used, including in asset assignments, it is better to make it Inactive, so as not to cause blank information in asset records.

Click to uncheck the **Active** box to set the record to inactive.

- Select the **Save** button or **Save - Add New** to save the changes.

Conditions Management

Create, edit, or delete conditions by selecting the **List Management** button on the Asset Management toolbar and select the **Conditions** tab.

- Select the **New** button to create a new condition. A blank view screen will display in the right panel.
- Enter the **Description** name. The **Active** box will be checked by default.
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Save** button to save the condition record or **Save - Add New** to save the condition record and create another record.

Edit Condition Record

- Use the Search function to search existing conditions by condition Name.

- Click to check the **Show Inactive** box to show inactive conditions in the list view and search.
- Select the Name on the left and the record will display in the View Screen.
- Select and change the **Description** field to make changes to the record.
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Delete** button to delete the item record.

If the Condition is being used, including in asset assignments, it is better to make it Inactive, so as not to cause blank information in asset records.

Click to uncheck the **Active** box to set the record to inactive.

- Select the **Save** button or **Save- Add New** to save the changes.

Acquisition Method Management

Create, edit, or delete an acquisition method by selecting the **List Management** button on the Asset Management toolbar and select the **Acquisition Method** tab.

List Maintenance - AcquisitionMethod

File Help

Home Tools Materials Model Catalog Transactions Reports List Management Cycle Count Admin

Employees CNTR Bus. Units Depts Sites/Locs Categories MFRs Vendors Conditions ACQ Unions

Search [C] [New]

Acquisition Method

Description
Expense Report
Other
Purchase Order

Show Inactive

Acquisition Method

Save Save - Add New Cancel Delete Print

Description: Expense Report

Active: ☒

You can only Delete a record that has not been used before.
If you are not sure you can attempt to delete and if it is in use the system will check for you.
If you wish to deactivate a record, you can set the record to inactive.
Changing a record to inactive will preserve the integrity of your system for reporting and searching, however editing a record that is using an inactive list item will be empty and you will need to adjust the list item before a save will be permitted.

- Select the **New** button to create a new acquisition method. A blank view screen will display in the right panel.

- Enter the **Description** name. The **Active** box will be checked by default.
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Save** button to save the acquisition record.
- Select the **Save - Add New** button to save the record and create a new acquisition record.

Edit Acquisition Method Record

- Use the Search function to search for existing acquisition methods.
- Click to check the **Show Inactive** box to show inactive acquisition methods in the search.
- Select the Description in the list and the record will display in the right panel.
- Select and change the **Description** field to make changes to the record.
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Delete** button to delete the item record.

If the Vendor is being used, including in asset assignments, it is better to make it Inactive, so as not to cause blank information in asset records.

Click to uncheck the **Active** box to set the record to inactive.

- Select the **Save or Save - Add New** button to save the acquisition changes.

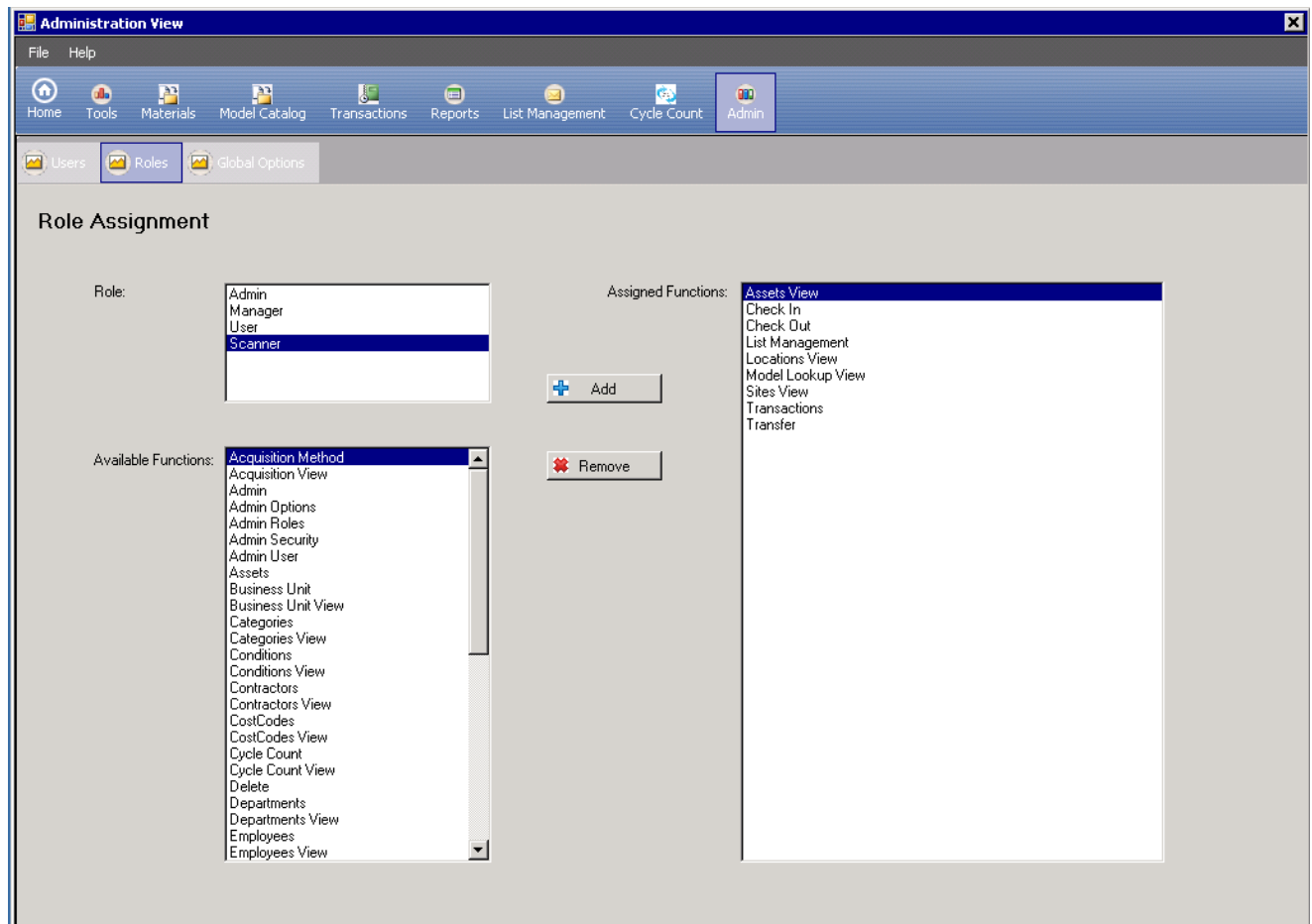
Administration

The Administrative functions set up User Names and Logins and allows Roles and Site Permissions to be assigned. Select the **Admin** button on the Asset Management toolbar.

Roles

There are four roles in the system: Admin, Manager, User and Scanner. The functions available to each of these roles can be customized within the Roles screen.

- Select the **Roles Tab**
- Select a **Role** in the Top left hand window (for example, Scanner).
- Select an Available Function (left panel) to assign to the role. Press the **Add** button to assign the role – it should now appear in the Assigned Functions window.
- To remove an assigned function from the role, select an assigned function (right panel) and press the **Remove** button – it should now appear back in the Available Function window.



Users

- Select the **Users** Tab.
- Select the **New** button to create a new user with permissions. A blank view screen will display in the right panel.

The screenshot shows the 'Administration View' window with the 'Users' tab selected. The interface is divided into two main panels. The left panel contains a search bar, a 'New' button, and a table of existing users. The right panel contains a form for creating or editing a user, with fields for selecting an employee, assigning a user ID, password, role, and site permissions.

Users Table:

Login	Name
Admin	Default, Default, 1
kyler	Graham, Kyler
mike	Kappa, Mike
erik	Kennedy, William
smodugno	Modugno, Stefano
soconner	O'Conner, Sean
gpotter	Potter, Gary
Scanner	scanner, scanner, scanner
security	Schiraldo, Gavin, 1
User	User, User, User

User Creation/Edit Form:

- Select Employee:** Agnello, Frank
- User ID:** franka
- Assign Password:** [masked]
- Re-enter Password:** [masked]
- Assign Role:** Manager
- Site Permissions:**
 - ☒ User has permissions to ALL sites
 - ☐ User has permissions to these selected sites:
 - [dropdown]
 - [dropdown] C
 - [dropdown] C
- ☒ User is Active

- Using the drop down list, **Select Employee** from the Employees List Management database.
- Type the **User ID** (Login).
- **Assign Password** by typing the password. **Re-enter Password**.
- Use the drop down list to select the **Assign Role**.
- Select **All Sites** Permissions or **Selected Site** permissions using the drop down menu for Sites.
- The **Active** box will be checked by default.
- Select the **Cancel** button to exit the record without saving.
- Select the **Save** button to save the Users record.

Edit Users Record

- Use the Search function to search existing Users by Name or Login. Press **Enter** or the **Search Icon** on the right side of the search box. Use the **Clear** button to clear the search criteria and display all the records.
- Click to check the **Show Inactive** box to show inactive user records in the list view and search.
- Select any Name on the left and the record will display in the right panel view area.
- Select the **Edit** button to make changes.
- Select and change the **User ID**, **Password**, **Assign Role** or **Site Permissions** to make changes to the record.
- Click to uncheck the **Active** box to deactivate the record.
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Delete** button to delete the record. If a record has been used, the record cannot be deleted.

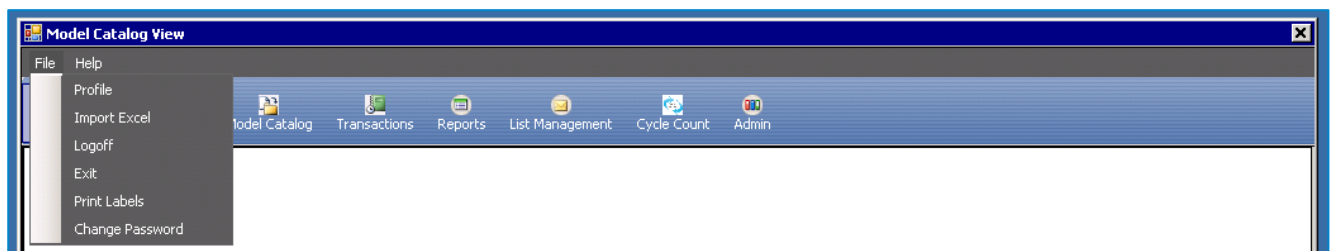
CAUTION: Deleting a record will result in the loss of all historical data. Deactivate a record by setting the record to inactive to preserve the integrity of the system for reporting and searching.

- Select the **Save** button to save the changes to the user record.

Application Configuration

User Profile Default Settings

Click the **File** button on the Asset Management toolbar and select **Profile**.



The Application Configuration pop up window will be displayed showing the User Profile tab.

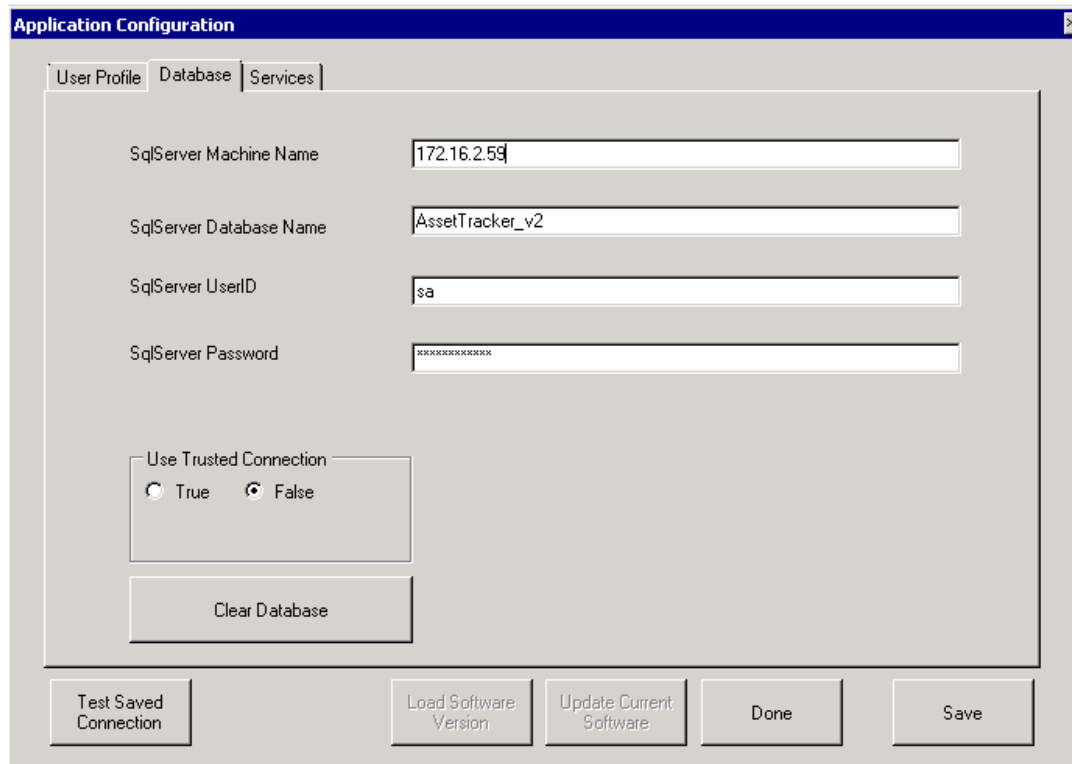
The screenshot shows the 'Application Configuration' dialog box with the 'Services' tab selected. The dialog has three tabs: 'User Profile', 'Database', and 'Services'. The 'Services' tab contains the following fields and controls:

- Asset Grid Default Sort:** A dropdown menu with 'Asset/Tool or Item Number' selected.
- Retired Grid Default Sort:** A dropdown menu with 'Asset/Tool or Item Number' selected.
- List Box Style:** A dropdown menu with 'DropDown' selected.
- Report Path:** A text field containing 'C:\Program Files (x86)\Compsee\AssetTracker\Reports' and a browse button (...).
- Hide Home Image:** An unchecked checkbox.
- Image Path and File:** A text field containing 'C:\Program Files (x86)\Compsee\AssetTracker\Home.jpg' and a browse button (...).
- Is Bartender installed on this computer?:** An unchecked checkbox.
- Barcode Path and File:** An empty text field and a browse button (...).
- Barcode Printer:** An empty text field and a browse button (...).
- Current Version:** A text field containing '2.0.1409.1099'.
- Database Version:** A text field containing '2.0.1409.1099'.

At the bottom of the dialog are five buttons: 'Test Saved Connection', 'Load Software Version', 'Update Current Software', 'Done', and 'Next'.

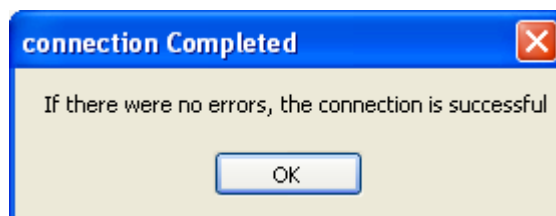
- Use the drop down list to select the **Asset Grid Default Sort**.
- Use the drop down list to select the **Retired Grid Default Sort**.
- Use the drop down list to select the **List Box Style**.
- Use the browse feature to search and select a different **Report Path**.
- Check the box to **Hide Home Image**. The Home Image is customer specific.
- Use the browse feature to search and select a customer-specific **Image Path and File**.
- Check the box if **Bartender is installed on this computer** (Bartender Integration, Label Printing software).
- If Bartender is installed, use the browse feature to select **Barcode Path and File**.
- If Bartender is installed, use the browse feature to select the **Barcode Printer**.
- Select the **Next** button to move to the Database tab.

Database Configuration



The image shows a screenshot of the 'Application Configuration' dialog box, specifically the 'Database' tab. The dialog has three tabs: 'User Profile', 'Database', and 'Services'. The 'Database' tab is active. It contains four text input fields: 'SqlServer Machine Name' with the value '172.16.2.59', 'SqlServer Database Name' with the value 'AssetTracker_v2', 'SqlServer UserID' with the value 'sa', and 'SqlServer Password' with masked characters 'xxxxxxxx'. Below these fields is a section for 'Use Trusted Connection' with two radio buttons: 'True' (selected) and 'False'. At the bottom of the main configuration area is a 'Clear Database' button. At the very bottom of the dialog are five buttons: 'Test Saved Connection', 'Load Software Version', 'Update Current Software', 'Done', and 'Save'.

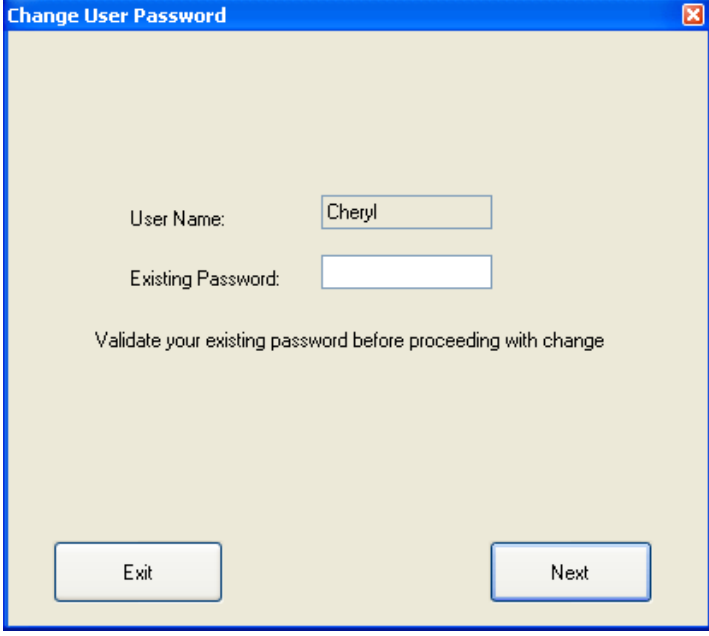
- Enter the **SqlServer Machine Name**.
- Enter the **SqlServer Database Name**.
- Enter the **SqlServer UserID**.
- Enter the **SqlServer Password**.
- Select the **Use Trusted Connection** True or False.
- Select the **Test Saved Connection** button to test the connection. If no errors display, the connection is successful.



- Select the **Done** button to save the configuration.

Change User Password

Click the **File** button and select **Change Password**.

A screenshot of a 'Change User Password' dialog box. The title bar is blue with the text 'Change User Password' and a close button. The main area has a light beige background. It contains two input fields: 'User Name:' with the text 'Cheryl' and 'Existing Password:' which is empty. Below these fields is the text 'Validate your existing password before proceeding with change'. At the bottom are two buttons: 'Exit' on the left and 'Next' on the right.

Change User Password

User Name: Cheryl

Existing Password:

Validate your existing password before proceeding with change

Exit Next

- Validate the existing password by entering the password in **Existing Password** and select the **Next** button.
- Select the **Exit** button to exit without changing the password.
- Enter the **New Password** and enter again to **Confirm Password**.
- Select the **Save** button to save the new password or the **Exit** button to exit the screen without saving the new password.

Using PowerTrack Asset Management

To start the PowerTrack Asset Management program on the PC, click on the **Asset Management** icon.



Enter the **Login ID** and **Password** assigned in Admin and click the **OK** button. Refer to Administration in the PowerTrack Asset Management Guide to create and modify user names and passwords.

Model Catalog

Create, edit or delete models with categories and manufacturers by selecting the **Model Catalog** button on the Asset Management toolbar.

- Toggle the radio button between Assets (Tools) and Materials to view the respective model catalog.
- The left panel shows search and filter criteria and the right panel shows the Model Grid. When entering the Model Catalog, the first 50 models will be displayed in the grid.
- The Model Grid displays Category, Manufacturer, Model, Item Number, Type, Description and Quantity. Each column is sortable by clicking on the column header.

The screenshot shows the 'Model Catalog View' window. It has a menu bar with 'File' and 'Help'. Below is a toolbar with icons for Home, Tools, Materials, Model Catalog (selected), Transactions, Reports, List Management, Cycle Count, and Admin. The main area is divided into three sections: a search bar with 'Model' and 'Item' fields, a left sidebar with 'Categories' and 'Manufacturers' lists, and a central table of model items. The 'Tools' radio button is selected. The table has columns: Category, Manufacturer, Model, Item Number, Type, Description, and Qty. At the bottom, there are checkboxes for 'Show Inactive', 'Model Count: 50', and 'Total Quantity: 1050'.

Category	Manufacturer	Model	Item Number	Type	Description	Qty
Laptops	Dell Inc.	Dell-005		UID	Laptop, 14 inch monitor	0
Laptops	Dell Inc.	Dell-006		UID	Laptop, 14 inch monitor	0
Laptops	Dell Inc.	Dell-009		UID	Laptop, 14 inch monitor	0
Laptops	Dell Inc.	Dell-100		UID	Laptop, 14 inch monitor	0
Laptops	Dell Inc.	Dell-101		UID	Laptop, 14 inch monitor	0
Laptops	Dell Inc.	Dell-102		UID	Laptop, 14 inch monitor	0
Digital Camera	HP	HP 1007-A		UID	The HP NiftyCam2	0
Printer	HP	C6050		UID	LaseJet 6050	0
Phone	HP	HP-234		UID	Phone, Windows 8	0
Keyboard	HP	HHP333		UID	Phone, Android 16GB	0
Shovel	HP	HP-3423	2233	I-Q	Shovel - 6 ft Electronic	539
Shovel	Microsoft	0923475025	123456	I-Q	Microsoft Shovel 2.0	145
Keyboard	Microsoft	MS12345		UID	Keyboard, 38 keys	0
Mouse	Microsoft	C-8789	32	I-Q	Mouse, USB	10
Keyboard	EMC	EMC-433	4335	I-Q	Keyboard with MSR, 48 Keys	10
Phone	EMC	EMC-34	89211	I-Q	Phone, Conference	10
Cement Mixers	Belkin	58334ee		UID	Cement Mixer, 50 Gallon	0
Air Card	Belkin	89798799		UID	Air Card - 4G Verizon	1
Air Card	Belkin	D44545489	145235	I-Q	Air Card - Item Qty	185
Cement Mixers	Belkin	T340lkjdr		UID	Cement Mixer - 50 Gallons	1
Printer - Cards	Belkin	S3433	342551	I-Q	Printer Card, 1GB	0

Create New Model

- Select the **New Model** button to display the view screen in the right panel to create a new model.
- Use the drop down list to select the **Category** from the Categories List.

- Use the drop down list to select the **Manufacturer** from the Manufacturers List.
- Type the **Model** number.
- Type the **Description** of the item (limited character look up field).
- Type the **Manufacturer's Model Description** of the item (maximum character description field).
- The **Active** box is checked by default.

The screenshot shows the 'Model Catalog View' application window. The interface includes a menu bar (File, Help) and a toolbar with icons for Home, Tools, Materials, Model Catalog, Transactions, Reports, List Management, Cycle Count, and Admin. The 'Model Catalog' tab is active.

Search fields for 'Model' and 'Item' are at the top left. Below them are buttons for 'Clear', 'New Model', 'Save Model', 'Save - Add New', 'Cancel', and 'Delete Model'. Radio buttons for 'Tools' and 'Materials' are also present.

On the left, there are two lists: 'Categories' (with items like Air Card, Cement Mixers, Compressor, etc.) and 'Manufacturers' (with items like Adtran, Ames, Apple, etc.).

The main form area contains the following fields and controls:

- Category:** A dropdown menu showing 'Drills, Hand'.
- Manufacturer:** A dropdown menu showing 'Dewalt'.
- Model:** A text field containing 'DWD9822'.
- Description:** A text field containing 'Drill, 1/2 inch'.
- Tool Type:** A section with two radio buttons: 'Unique ID' (selected) and 'Item-Qty'. Below 'Unique ID' is a checkbox for 'Scheduled Maintenance'.
- Manufacturer's Model Description:** A text area containing 'Dewalt 20 V max, 1/2 inch, 3-speed hammerdrill, 535 watts'.
- Active:** A checkbox that is checked by default.
- Model Notes:** A text area containing 'Weight with battery 6.1 lbs.' and 'One year free service contract'.

At the bottom left, a note states: 'Highlight a row apply, click again to remove'.

- For Asset (Tool) models, use the radio button to classify the model as Unique ID or Item-Quantity.
 - If Unique ID, check the **Required Scheduled Maintenance** box if scheduled maintenance will be tracked within the Asset Management application.
 - IF Item-Quantity, enter the Item number to be associated with the model.
- For Material models, enter the item number to be associated with the model.
- Type any special **Model Notes** for this item.
- Select the **Cancel** button to exit the record without saving the changes.

- Select the **Save Model** button to save the model.
- Select the **Save - Add New** button to save the model record and create a new record.

Use the **Maintain Last Values** box in conjunction with **Save – Add New** when entering another new model similar to the last. The new model will copy all fields from the previous model except the model ID. Edits may then be made as required for the new model.

Model Search Functions

- Use the Search boxes in the top left panel to search for an individual or group of models. This is an embedded string search. Press **Enter** or the **search icon** to initiate the search.
- Type into the **Search Model** box to match on both the Model and description fields in the model grid.
- Type into the **Search Item** box to match on the Item # in the model grid.
- Use the **Clear** button (below the search boxes) to clear the search criteria and display all the model records in the grid (this will also remove the first 50 filtering).
- Another way to display all model records (remove the first 50 filtering), is to type the % character in the Search Model box and press **Enter** or the **search icon**.

Model Filter Functions

- Select a category from the list of **Categories** on the left. All records for that category will display in the view screen.
- Select a manufacturer from the list of **Manufacturers** on the left. All records for that manufacturer will display in the view screen.
- Select a category and manufacturer and all records that meet both criteria will be displayed in the view screen.
- Click a second time on an active filter to clear it, or use the **Clear** button (above the filter area) to clear all Filter criteria and display all model records.

Edit Model

- To edit a model, double click on a record in the model grid (or single click to select a record and press the **Edit** button).
- Make any edits to the appropriate fields.
- Select the **Cancel** button to exit the record without saving the edits.
- Select the **Save Model** button to save the changes to the model.
- Select the **Save - Add New** button to save the model record and create a new record.
- Click the **Delete Model** button to delete the model.

CAUTION: Deleting a record will result in the loss of all historical data. Deactivate a record by setting the record to inactive (uncheck the Active checkbox) to preserve the integrity of the system for reporting and searching.

Create New Item Record for a Selected Model

- By selecting a model in the model grid and clicking on the ***New Item Record*** button, you will transition to a screen to create a New Asset (Tool) or Material record, depending on the model selected. The model number and other attributes of the model will be auto-filled.

The **Create New Asset** (Tool) and **Create New Material** functions will be covered in more detail in the next sections.

Export Model Grid

- By pressing the Export button, the contents of the displayed model grid can be exported to a PDF report, an Excel or .csv file.
 - Select the directory to store the file, the file name and type of file, then click **Save**
 - An Export Complete message will be displayed; press **OK**

Asset (Tools) Grid

The example screens use the Tool description. Tool will be used interchangeably with Asset during the balance of this user manual.

Create, edit, or retire a Tool by selecting the **Tools** button on the Asset Management toolbar. Select the **Tools** tab.

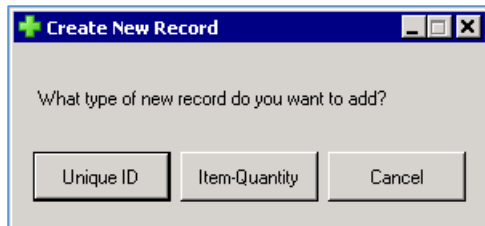
The screenshot shows the 'Asset Lookup View' window with the 'Tools' tab selected. The window has a menu bar (File, Help) and a toolbar with icons for Home, Tools, Materials, Model Catalog, Transactions, Reports, List Management, Cycle Count, and Admin. Below the toolbar, there are tabs for 'Tools' and 'Retired Tools'. The 'Tools' tab is active, showing a search section with fields for 'Tool or Item #', 'Model', and 'Serial Number'. To the left of the table are filter sections for 'Category', 'Description', 'Manufacturer', 'Sites', 'Assignment', 'Business Unit: (filter Departments only)', 'Departments', and 'Conditions'. The main area contains a table with columns: Category, Tool or Item #, Description, Model, Qty, Current Site, Current Location, and Manufacturer. The table lists various tools including drills, shovels, keyboards, and an air card. At the bottom, it shows 'Item Count: 50' and 'Total Quantity: 1015'.

Category	Tool or Item #	Description	Model	Qty	Current Site	Current Location	Manufacturer
Drills, Hand	101	Drill, 1/2 Inch Set	DWD777	1	Warehouse 51	B21	Dewalt
Drills, Hand	102	Drill, 1/2 Inch Set	DWD777	1	I5 interchange	None	Dewalt
Drills, Hand	102X	Drill, 1/2 Inch Set	DWD777	1	Warehouse 51	B21	Dewalt
Drills, Hand	12	Drill, 3/4 inch	CR-9845	1	Warehouse 51	B22	Craftsman
Shovel	123456	Microsoft Shovel ...	0923475025	13	TEST Site	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	24	Warehouse 51	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	7	Narrows Bridge	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	12	I5 interchange	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	4	Station Warehouse	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	10	Warehouse 51	B21	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	20	Warehouse 50	A10	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	15	Warehouse 50	A11-B2	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	1	Dallas Tool Room	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	18	Tacoma Fun Park	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	21	Northwest Wareh...	None	Microsoft
Air Card	12355	Samsung 4G LT...	SCH-LC12	1	Warehouse 50	A13-B5	Samsung
Keyboard	1243	Keyboard, 32 key	AP-3432	16	A secondary stoc...	None	Apple
Keyboard	1243	Keyboard, 32 key	AP-3432	5	Warehouse 51	None	Apple
Keyboard	1243	Keyboard, 32 key	AP-3432	20	Warehouse 50	None	Apple
Keyboard	1243	Keyboard, 32 key	AP-3432	12	I5 interchange	None	Apple
Keyboard	1243	Keyboard, 32 key	AP-3432	4	A secondary stoc...	21	Apple
Keyboard	1243	Keyboard, 32 key	AP-3432	15	Station Warehouse	None	Apple

Create New Tool Record

NOTE: A new asset/tool record cannot be added to the database until its manufacturer's Model ID has been set up in the Model Catalog.

- Select the **New Record** button to display the blank entry screen to create a new tool record.
- A pop-up window will ask which type of record that you want to add. Select Unique ID or Item-Quantity.



A) New Unique ID Record:

 The main window of the "Asset Lookup View" application. It features a menu bar (File, Help) and a toolbar with icons for Home, Tools, Materials, Model Catalog, Transactions, Reports, List Management, Cycle Count, and Admin. Below the toolbar is a tabbed interface with "Tools" and "Retired Tools". The "Tools" tab is active, showing a search area on the left with fields for Tool or Item #, Model, and Serial Number, and a filters section with dropdowns for Category, Description, Manufacturer, Sites, Assignment, Business Unit, Departments, and Conditions. The main area contains a "New Record" button, a "Save" button, a "Save & Add New" button, a "Retire" button, an "Export Data" button, and a "Cancel" button. The form fields include: Tool Unique ID (68532), Maintain Last (checkbox), Category (Drills, Hand), Manufacturer (Black & Decker), Model (DB564-eg - Drill, hand, 3/4"), Description (Drill, hand, 3/4"), Manufacturer's Model Description (Black and Decker, Hand Drill, 3/4" 7000 RPM, two year warranty, Nicd battery), Current Information (View Only) with Site and Location fields, Home Information with Home Site and Home Location dropdowns, Ownership section with Serial #, Business Unit, Assignment, Condition, Department, and Return fields, and a Tool Notes text area.

- Type the new **Unique ID #**
- Click to check the **Maintain Last Values** box when entering multiple Unique ID tools for the same Model (use with Save & Add New button).
- Use the drop down **Category** and **Manufacturer** lists to filter the **Model** selection list.
- The first model of the filtered selection list will appear in the Model selection although a selection has not yet been made. Click on the drop down icon  and select the required model. The Description and Manufacturer's Model Description will automatically display.
- Use the drop down lists to select the **Home Site** and **Home Location** from the Sites\Locations List Management database.

NOTE: The Home Site and Home Location will automatically be entered as the current site and location, respectively when the new record is saved.

- Type the **Serial Number**, if applicable.
- Use the drop down list to select the **Condition** from the Conditions List Management database. THIS IS A REQUIRED FIELD.
- Use the drop down list to select the **Business Unit** from the Business Unit List Management database.
- Use the drop down list to select the **Department** ownership from the Departments List Management database. The Department will be filtered by the Business Unit selection.
- Type any **Tool Notes** applicable to this individual tool.

Select Cost/Purchase Tab

- Use the drop down list to select the **Vendor** from the Vendor List Management database.
- Use the drop down control to select the **Date Created or Acquisition**. The default is the current date.
- Use the drop down list to select the **Acquisition Method** from the Acquisition Method List Management database.
- Type the **Purchase Order** number.
- Type the **Cost**.

Select Warranty Tab

- Use the calendar functions to enter the start and end date for any applicable **Labor, Parts** and **Install** warranties
 - Clicking the checkbox integrated in the control will add today's date if the box is empty or will clear the date if there is one already displayed.

Select the Service Management Tab

(only available if the model is set up for Required Scheduled Maintenance)

- Use the drop down control to select the date of the next scheduled maintenance.
- Note that the other inactive fields on this tab are intended for a future version
- Select the **Cancel** button to exit the record without saving.
- Select the **Save** button to save the record.
- Select the **Save – Add New** button to save the record and create another new record.

NOTE: The saved record for a UID Tool will display in History as a New Tool UID

B) New Item-Quantity Record

- Use the drop down **Category** and **Manufacturer** lists to filter the **Model** selection list.
- The first model of the filtered selection list will appear in the Model selection although a selection has not yet been made. Click on the drop down icon  and select the required model. The **Item number**, **Description** and **Manufacturer's Model Description** will automatically display.
- Select the **Site** and **Location** for the new record. If you select a Site and location that already has a quantity for that item, you will add quantity to the existing record and not create a new record in the Tool Grid.
- Select the **Quantity** to receive and the **Unit Cost** for this receipt.

Select Cost/Purchase Tab

- Select the Preferred Vendor from the drop down vendor list.

Select Min/Max Tab

- Enter the High, Target and Low Amount for in the Min/Max Quantities for this Site

- Select the **Cancel** button to exit the record without saving.
- Select the **Save** button to save the record.
- Select the **Save – Add New** button to save the record and create another new record.

NOTE: The new record for an Item-Quantity Tool (with its received quantity) will display in History as a Receipt

New Item-Quantity Record – Short Cut

Another method to add a new item-Quantity record is to select the item in the Tool Grid and the **Edit Selected** button. Select a different **Site** and/or **Location** where there is no existing quantity. Enter the **New Quantity** and **Unit Cost**.

Edit Tool Record

The default state of the grid displays the first 50 records from the database. Use the search and filter functions to find the tool record to edit.

The screenshot shows the 'Asset Lookup View' application window. It features a menu bar (File, Help) and a toolbar with icons for Home, Tools, Materials, Model Catalog, Transactions, Reports, List Management, Cycle Count, and Admin. Below the toolbar, there are tabs for 'Tools' and 'Retired Tools'. The 'Tools' tab is active, displaying a search and filter panel on the left and a grid of tool records on the right.

Search Panel:

- Search:** Tool or Item #, Model, Serial Number (each with a search icon and a 'Clear' button).
- Filters:** Category, Description, Manufacturer, Sites, Assignment, Business Unit (filter Departments only), Departments, Conditions (each with a dropdown menu and an 'Apply' button).

Grid Actions: New Record, Edit Selected, Save & Add New, Retire, Export Data, Cancel.

Grid Data:

Category	Tool or Item #	Description	Model	Qty	Current Site	Current Location	Manufacturer
Drills, Hand	101	Drill, 1/2 Inch Set	DWD777	1	Warehouse 51	B21	Dewalt
Drills, Hand	102	Drill, 1/2 Inch Set	DWD777	1	I5 interchange	None	Dewalt
Drills, Hand	102X	Drill, 1/2 Inch Set	DWD777	1	Warehouse 51	B21	Dewalt
Drills, Hand	12	Drill, 3/4 inch	CR-9845	1	Warehouse 51	B22	Craftsman
Shovel	123456	Microsoft Shovel ...	0923475025	13	TEST Site	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	24	Warehouse 51	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	7	Narrows Bridge	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	12	I5 interchange	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	4	Station Warehouse	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	10	Warehouse 51	B21	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	20	Warehouse 50	A10	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	15	Warehouse 50	A11-B2	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	1	Dallas Tool Room	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	18	Tacoma Fun Park	None	Microsoft
Shovel	123456	Microsoft Shovel ...	0923475025	21	Northwest Wareh...	None	Microsoft
Air Card	12355	Samsung 4G LT...	SCH-LC12	1	Warehouse 50	A13-B5	Samsung
Keyboard	1243	Keyboard, 32 key	AP-3432	16	A secondary stoc...	None	Apple
Keyboard	1243	Keyboard, 32 key	AP-3432	5	Warehouse 51	None	Apple
Keyboard	1243	Keyboard, 32 key	AP-3432	20	Warehouse 50	None	Apple
Keyboard	1243	Keyboard, 32 key	AP-3432	12	I5 interchange	None	Apple
Keyboard	1243	Keyboard, 32 key	AP-3432	4	A secondary stoc...	21	Apple
Keyboard	1243	Keyboard, 32 key	AP-3432	15	Station Warehouse	None	Apple

Item Count: 50 **Total Quantity: 1015**

Search Function

- On the left side of the screen, use the Search function for **Tool or Item #**, **Model** or **Serial Number** to show a specific Tool or group of tools. The Tool or Item # search will match on the Tool or Item # field, the Model search will match on the Model and Description fields, and the Serial Number search will match on the Serial number field. This is an embedded string search. Press **Enter** or the **search button** beside the search choice to initiate the search. Use the global search function % (or click on one of the three search buttons without making a selection) to show all tools in the grid.
- Use the **Clear** button to clear the search criteria.

Filter Function

To use the Filter function, select the **Enable** button on the left side of the screen to activate the filter function.

- To filter by **Category**, use the drop down list to select a category. Select the **Apply** button to apply the filter and display the filtered records.

The screenshot shows the 'Asset Lookup View' application window. On the left, there is a search and filter panel. The search section includes fields for 'Tool or Item #', 'Model', and 'Serial Number', each with a search button and a 'Clear' button. The filter section includes dropdown menus for 'Category', 'Description', 'Manufacturer', 'Sites', 'Assignment', 'Business Unit: (filter Departments only)', 'Departments', and 'Conditions', each with an 'Apply' button and a 'Clear' button. The main area on the right displays a table of tool records. The table has columns: Category, Tool or Item #, Description, Model, Qty, Current Site, Current Location, and Manufacturer. The records show various drill bits and sets, mostly categorized as 'Drills, Hand'. At the bottom of the table, it says 'Item Count: 36' and 'Total Quantity: 54'.

Category	Tool or Item #	Description	Model	Qty	Current Site	Current Location	Manufacturer
Drills, Hand	101	Drill, 1/2 Inch Set	DWD777	1	Warehouse 51	B21	Dewalt
Drills, Hand	102	Drill, 1/2 Inch Set	DWD777	1	I5 interchange	None	Dewalt
Drills, Hand	102X	Drill, 1/2 Inch Set	DWD777	1	Warehouse 51	B21	Dewalt
Drills, Hand	12	Drill, 3/4 inch	CR-9845	1	Warehouse 51	B22	Craftsman
Drills, Hand	13	Drill, 3/4 inch	CR-9845	1	Warehouse 50	A13-B5	Craftsman
Drills, Hand	14	Drill, 3/4 inch	CR-9845	1	HQ Office	923	Craftsman
Drills, Hand	15	Drill, 3/4 inch	CR-9845	1	I5 interchange	None	Craftsman
Drills, Hand	16	Drill, 3/4 inch	CR-9845	1	Warehouse 51	B23	Craftsman
Drills, Hand	17	Drill, 3/4 inch	CR-9845	1	I5 interchange	None	Craftsman
Drills, Hand	18	Drill, 3/4 inch	CR-9845	1	I5 interchange	None	Craftsman
Drills, Hand	19	Drill, 3/4 inch	CR-9845	1	Building 49 Facility	B21	Craftsman
Drills, Hand	20	Drill, 3/4 inch	CR-9845	1	I5 interchange	None	Craftsman
Drills, Hand	21	Drill, 3/4 inch	CR-9845	1	I5 interchange	None	Craftsman
Drills, Hand	22	Drill, 3/4 inch	CR-9845	1	Warehouse 50	A13-B5	Craftsman
Drills, Hand	229	Drill, 1/2 Inch Set	DWD777	1	Warehouse 50	A11-B2	Dewalt
Drills, Hand	25	Drill, 1/2 inch	BD3223244	1	I5 interchange	None	Black & Decker
Drills, Hand	26	Drill, 1/2 inch	D-1000	1	Warehouse 51	B23	Craftsman
Drills, Hand	3423	Drill, 1/2 inch	DWD2008	10	A secondary stoc...	None	Dewalt
Drills, Hand	3423	Drill, 1/2 inch	DWD2008	10	Warehouse 50	A10	Dewalt
Drills, Hand	345	Drill, 1/2 Inch Set	DWD777	1	Narrows Bridge	None	Dewalt
Drills, Hand	348	Drill, 1/2 inch	DWDU001	1	Warehouse 50	None	Craftsman
Drills, Hand	349	Drill, 1/2 Inch Set	DWD777	1	Warehouse 50	A11-B2	Dewalt

Item Count: 36 Total Quantity: 54

- To filter by **Description**, use the drop down list to select a description.
- To filter by **Manufacturer**, use the drop down list to select a manufacturer.
- To filter by **Sites**, use the drop down list to select a site.
- To filter by **Assignment**, use the drop down list to select an assignment (will find UID Tools only).
- To filter by **Departments**, first use the **Business Unit** filter to select the Business Unit, and then use the Department drop down list to select a department (will find UID Tools only)
- To filter by equipment **Conditions**, use the drop down list to select a condition (will find UID Tools only).
- Always select Apply to apply the filter.
 - Select the **Clear** button to clear the filter criteria and display all the records.

Filters work in conjunction with each other and with any Search criteria that is set. For example, you can search for Category = Drills, Sites = Warehouse 50 and Model includes the string "1/2 inch". The resulting search will show only tools that match on all three criteria.

CAUTION: If you are not seeing the results that you are expecting in the grid, check to see if another filter or search criteria is inadvertently set and needs to be cleared.

To Edit a record shown in the Tool Grid, double click on the record to be edited or select the record and click the **Edit Selected** button.

- **Editing Unique ID Record**

Asset Lookup View

File Help

Home Tools Materials Model Catalog Transactions Reports List Management Cycle Count Admin

Tools Retired Tools

Search

Tool or Item #

Model

Serial Number

Filters

Category:

Description:

Manufacturer:

Sites:

Assignment:

Business Unit: (filter Departments only)

Departments:

Conditions:

Tool **Cost/Purchase** **Warranty** **Service/Maint.**

Tool Unique ID: ☐ Maintain Last

Category:

Manufacturer:

Model:

Description:

Manufacturer's Model Description:

Current Information (View Only)

Site:

Location:

Home Information

Home Site:

Home Location:

Ownership

Serial #: Business Unit: Assignment:

Condition: Department: Return:

Tool Notes

Requires drill bits

- Select the field to edit and make changes to the record.
 - Select the **Cancel** button to exit the record without saving the changes.
 - Select the **Save or Save – Add New** button to save the changes.
- **Editing Item-Quantity Record**

Asset Lookup View

File Help

Home Tools Materials Model Catalog Transactions Reports List Management Cycle Count Admin

Tools Retired Tools

Search Clear

Tool or Item #

Model

Serial Number

Filters Enable Clear

Category:

Description:

Manufacturer:

Sites:

Assignment:

Business Unit: (filter Departments only)

Departments:

Conditions:

+ New Record Save + Save & Add New Retire Export Data Cancel

Tool Cost/Purchase Min/Max

Item #: 145235 ☐ Maintain Last

Category: Air Card Clear

Manufacturer: Belkin

Model: D44545489 - Air Card - Item Qty

Description: Air Card - Item Qty

Current Information

Site: Seattle Gameworks Qty: 5

Location: None

Inventory Adjustment

Receive New Quantity Unit Cost

Quantity Adjustment

Enter Negative Qty for Subtraction

- Select the field to edit and make changes to the record.
 - Receive additional quantities to the Site/Location (Enter **Quantity** and **Unit Cost**)
 - Enter a **Quantity Adjustment** to the record
 - Enter or Change **Preferred Vendor** (under Cost/Purchase tab)
 - Enter or Change **Min/Max** values (under Min/Max tab)
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Save or Save – Add New** button to save the changes.

Retire Tools

A Unique ID tool may be retired by first selecting the tool in the Tool Grid and click on the Edit Selected button.

- Select the **Retire** button to retire the tool.
- The Retire Asset Details screen will display.

The screenshot shows the 'Asset Lookup View' window with the 'Tools' tab selected. The 'Retired Tools' sub-tab is active, displaying the 'Retire Asset' screen for tool ID 941. The screen is divided into several sections: 'Manufacturer/Model' with fields for Category (Cement Mixers), Manufacturer (Craftsman), Model (CM65454), and Description (Cement Mixer, 50 Gal); 'Current Information' with Site (Warehouse 50) and Location (None); and 'General' and 'Current Details' sections with various fields like Serial Number (9070), Vendor, Acquisition Date (3/27/2015 12:00:00 AM), Purchase Cost (\$0.00), Condition (Good), Home Site (Warehouse 50), Home Location (None), Business Unit, Department, Assignment, Return Date, and Next Scheduled Maintenance (8/21/2015 5:13:59 PM). At the top right of the 'Retire Asset' window are buttons for 'Return', 'Retire', and 'Print'.

- Select the **Return** button to exit the Retire Asset screen and return to the Tool Lookup View without retiring the record.
- Select the **Retire** button to retire the asset.
- A window will be displayed to enter the reason for retiring the asset.

The dialog box contains the following text: 'Retiring an Asset will take the product away from any future use, all history will be maintained and you will be able to un-retire if you choose to at a later date.' Below this text is a label 'Reason for Retiring this Asset:' followed by a dropdown menu. At the bottom right are two buttons: 'Retire' and 'Cancel'.

- Enter the reason from the selection list and click on the **Retire** button.
- Select the **Cancel** button to exit Asset Details without retiring the asset.
- Select the **Retire** button to retire the asset.

Retired Tools Lookup

To review retired tools or to un-retire tools, select the **Retired Tools** tab on the Tool Lookup screen.

The screenshot shows the 'Retired Asset View' window. On the left is a search and filter panel. The main area displays a table of retired tools. At the top of the table are buttons: '+ New Record', 'Edit Selected', '+ Save & Add New', 'Retire Item', 'Export Data', and 'Cancel'. The table has the following data:

Category	Tool or Item #	Description	Model	Qty	Current Site	Current Location	Manufacturer
Drills, Hand	48554	Drill, 1/2 Inch Set	DWD777	1	Great job site	None	Dewalt
Drills, Hand	8789	Drill, 1/2 Inch Set	DWD777	1	A main stocking ...	None	Dewalt
Cement Mixers	941	Cement Mixer, 50...	CM65454	1	Warehouse 50	None	Craftsman
Drills, Hand	98	Drill, 1/2 inch	DWDU001	3	Warehouse 50	None	Craftsman

At the bottom of the window, it shows 'Item Count: 4' and 'Total Quantity: 6'.

- In the view screen, double click on the retired tool record or select the record and click on the **Edit Selected** button.

Retired Asset View

File Help

Home Tools Materials Model Catalog Transactions Reports List Management Cycle Count Admin

Tools Retired Tools

Search Clear

Tool or Item #

Model

Serial Number

Filters Apply Clear

Category:

Description:

Manufacturer:

Sites:

Assignment:

Business Unit: (filter Departments only)

Departments:

Conditions:

Tool Cost/Purchase Warranty Service/Maint.

Tool Unique ID: 8789 ☐ Maintain Last

Category: Drills, Hand Clear

Manufacturer: Dewalt

Model: DWD777 - Drill, 1/2 Inch Set

Description: Drill, 1/2 Inch Set

Manufacturer's Model Description: Variable Speed Drill, 1/2 inch, 2000 RPM

Current Information (View Only)

Site: A main stocking place

Location: None

Home Information

Home Site: Warehouse 50

Home Location: None

Ownership

Serial #: 99999999 Business Unit: HQ Assignment:

Condition: Broken - Do Not Use Department: Bid Job Costs Return:

Tool Notes

New Record Save Save & Add New Un-Retire Export Data Cancel

Review the record – it cannot be edited.

- Select the **Cancel** button to exit the record.
- Select the **Un-Retire** button to un-retire the tool.
- Enter the **Site** and **Location** for the returning tool.

Asset Details

Un-Retiring an Asset will bring the Asset back with full history

Current Information:

Site:

Location:

Un-Retire Cancel

- Select the **Un-Retire** button to un-retire the tool or the **Cancel** button to cancel.

Material Lookup

Create or edit a material record by selecting the **Materials** button on the Asset Management toolbar.

The screenshot shows the 'Asset Lookup View' window. The 'Materials' tab is selected in the toolbar. On the left, there is a search and filter panel. The main area displays a table of materials with columns: Category, Item #, Description, Model, Qty, Current Site, Current Location, and Manufacturer. The table lists various items like Nuts, Washers, Machine Screws, and Bolts. At the bottom, it shows 'Item Count: 40' and 'Total Quantity: 1040'.

Category	Item #	Description	Model	Qty	Current Site	Current Location	Manufacturer
Nuts	067-101-1	Nut, 1/4" Torque...	1767	2	Warehouse 51	B23	Craftsman
Nuts	067-101-1	Nut, 1/4" Torque...	1767	1	Warehouse 51	B22	Craftsman
Nuts	067-101-1	Nut, 1/4" Torque...	1767	1	Station Warehouse	None	Craftsman
Nuts	067-101-1	Nut, 1/4" Torque...	1767	6	A main stocking ...	None	Craftsman
Washers	3432	Washer, 1/2 inch	Kus-342	6	Northwest Wareh...	A1	Kushlan
Washers	3432	Washer, 1/2 inch	Kus-342	7	Dallas Tool Room	None	Kushlan
Washers	3432	Washer, 1/2 inch	Kus-342	3	Warehouse 51	B23	Kushlan
Washers	3432	Washer, 1/2 inch	Kus-342	3	Warehouse 51	B21	Kushlan
Machine Screws	43433	Screw, 3/4"	TS-343	8	Dallas Tool Room	None	Tacoma Screw
Machine Screws	43433	Screw, 3/4"	TS-343	25	A main stocking ...	B21	Tacoma Screw
Machine Screws	43433	Screw, 3/4"	TS-343	2	Warehouse 50	A13-B5	Tacoma Screw
Machine Screws	43433	Screw, 3/4"	TS-343	20	Warehouse 51	B23	Tacoma Screw
Machine Screws	43433	Screw, 3/4"	TS-343	30	Warehouse 51	B22	Tacoma Screw
Machine Screws	43433	Screw, 3/4"	TS-343	27	Warehouse 50	None	Tacoma Screw
Washers	453333	Washer, 1/2	C-43555	40	Warehouse 50	A10	Black & Decker
Washers	453333	Washer, 1/2	C-43555	54	Warehouse 51	B22	Black & Decker
Washers	6565	Washer, 1/2 inch	NG-WA434	23	Dallas Tool Room	None	Netgear
Washers	6565	Washer, 1/2 inch	NG-WA434	10	Warehouse 50	A13-B5	Netgear
Washers	6565	Washer, 1/2 inch	NG-WA434	18	Warehouse 50	A11-B2	Netgear
Washers	6565	Washer, 1/2 inch	NG-WA434	20	Warehouse 50	A10	Netgear
Washers	6565	Washer, 1/2 inch	NG-WA434	20	Warehouse 50	None	Netgear
Bolts	684356	Bolt 1/2 inch	S123-456	14	Warehouse 51	B21	Tacoma Screw

Create New Material Record

NOTE: A new material record cannot be added to the database until its manufacturer's Model ID has been set up in the Model Catalog.

- Select the **New Record** button to display the blank entry screen to create a new material record.

- Use the drop down **Category** and **Manufacturer** lists to filter the **Model** selection list.
- The first model of the filtered selection list will appear in the Model selection although a selection has not yet been made. Click on the drop down icon  and select the required model. The **Item number**, **Description** and **Manufacturer's Model Description** will automatically display.
- Select the **Site** and **Location** for the new record. If you select a Site and location that already has a quantity for that item, you will add quantity to the existing record and not create a new record in the Material Grid.
- Select the **Quantity** to receive and the **Unit Cost** for this receipt.

Select Cost/Purchase Tab

- Select the Preferred Vendor from the drop down vendor list.

Select Min/Max Tab

- Enter the High, Target and Low Amount for in the Min/Max Quantities for this Site
- Select the **Cancel** button to exit the record without saving.

- Select the **Save** button to save the record.
- Select the **Save – Add New** button to save the record and create another new record.

NOTE: The new record for a Material item (with its received quantity) will display in History as a Receipt

New Material Record – Short Cut

Another method to add a new Material record is to select the item in the Material Grid and the **Edit Selected** button. Select a different **Site** and/or **Location** where there is no existing quantity. Enter the **New Quantity** and **Unit Cost**.

Edit Material Record

The default state of the Materials grid displays the first 50 records from the database. Use the search and filter functions to find the tool record to edit.

Asset Lookup View

File Help

Home Tools **Materials** Model Catalog Transactions Reports List Management Cycle Count Admin

Materials

Search Clear

Item #

Model

Filters Enable Clear

Category:

Description:

Manufacturer:

Sites:

+ New Record Edit Selected + Save & Add New Retire Export Data Cancel

Category	Item #	Description	Model	Qty	Current Site	Current Location	Manufacturer
Nuts	067-101-1	Nut, 1/4" Torque...	1767	43	Northwest Wareh...	None	Craftsman
Nuts	067-101-1	Nut, 1/4" Torque...	1767	2	Warehouse 51	B23	Craftsman
Nuts	067-101-1	Nut, 1/4" Torque...	1767	1	Warehouse 51	B22	Craftsman
Nuts	067-101-1	Nut, 1/4" Torque...	1767	1	Station Warehouse	None	Craftsman
Nuts	067-101-1	Nut, 1/4" Torque...	1767	6	A main stocking ...	None	Craftsman
Washers	3432	Washer, 1/2 inch	Kus-342	6	Northwest Wareh...	A1	Kushlan
Washers	3432	Washer, 1/2 inch	Kus-342	7	Dallas Tool Room	None	Kushlan
Washers	3432	Washer, 1/2 inch	Kus-342	3	Warehouse 51	B23	Kushlan
Washers	3432	Washer, 1/2 inch	Kus-342	3	Warehouse 51	B21	Kushlan
Washers	3432	Washer, 1/2 inch	Kus-342	10	Warehouse 50	None	Kushlan
Machine Screws	43433	Screw, 3/4"	TS-343	8	Dallas Tool Room	None	Tacoma Screw
Machine Screws	43433	Screw, 3/4"	TS-343	25	A main stocking ...	B21	Tacoma Screw
Machine Screws	43433	Screw, 3/4"	TS-343	2	Warehouse 50	A13-B5	Tacoma Screw
Machine Screws	43433	Screw, 3/4"	TS-343	20	Warehouse 51	B23	Tacoma Screw
Machine Screws	43433	Screw, 3/4"	TS-343	30	Warehouse 51	B22	Tacoma Screw
Machine Screws	43433	Screw, 3/4"	TS-343	27	Warehouse 50	None	Tacoma Screw
Machine Screws	45333	Machine Screws ...	K343	30	Warehouse 50	None	Kushlan
Washers	453333	Washer, 1/2	C-43555	40	Warehouse 50	A10	Black & Decke
Washers	453333	Washer, 1/2	C-43555	54	Warehouse 51	B22	Black & Decke
Bolts	6425	Bolt, 1/8th inch	99999	76	Dallas Tool Room	None	HP
Bolts	6425	Bolt, 1/8th inch	99999	82	A main stocking ...	None	HP
Washers	6565	Washer, 1/2 inch	NG-WA434	31	Northwest Wareh...	None	Netgear

Item Count: 50 Total Quantity: 1466

Search Function

- On the left side of the screen, use the Search function for **Item #** or **Model** to show a specific Material or group of materials. The Item # search will match on the Item # field, and the Model search will match on the Model and Description fields. This is an embedded string search. Press **Enter** or the **search button** beside the search choice to initiate the search. Use the global search function % (or click on one of the two search buttons without making a selection) to show all materials in the grid.
- Use the **Clear** button to clear the search criteria.

Filter Function

To use the Filter function, select the **Enable** button on the left side of the screen to activate the filter function.

- To filter by **Category**, use the drop down list to select a category. Select the **Apply** button to apply the filter and display the filtered records.
- To filter by **Description**, use the drop down list to select a description.
- To filter by **Manufacturer**, use the drop down list to select a manufacturer.
- To filter by **Sites**, use the drop down list to select a site.
- Always select Apply to apply the filter.
- Select the **Clear** button to clear the filter criteria and display all the records.

Filters work in conjunction with each other and with any Search criteria that is set.

CAUTION: If you are not seeing the results that you are expecting in the grid, check to see if another filter or search criteria is inadvertently set and needs to be cleared.

To Edit a record shown in the Materials Grid, double click on the record to be edited or select the record and click the **Edit Selected** button.

The screenshot shows the 'Asset Lookup View' window with the 'Materials' tab selected. The interface includes a search panel on the left with fields for 'Item #' and 'Model', and a 'Filters' section with dropdowns for 'Category', 'Description', 'Manufacturer', and 'Sites'. The main content area displays the details for a specific material record. The 'Material' tab is active, showing fields for 'Item #', 'Category', 'Manufacturer', 'Model', and 'Description'. The 'Current Information' section shows 'Site' as 'Northwest Warehouse', 'Qty' as '43', and 'Location' as 'None'. The 'Inventory Adjustment' section includes fields for 'Receive New Quantity', 'Unit Cost', and 'Quantity Adjustment', with a note to 'Enter Negative Qty for Subtraction'.

- Select the field to edit and make changes to the record.
 - Receive additional quantities to the Site/Location (Enter **Quantity** and **Unit Cost**)
 - Enter a **Quantity Adjustment** to the record
 - Enter or Change **Preferred Vendor** (under Cost/Purchase tab)
 - Enter or Change **Min/Max** values (under Min/Max tab)
- Select the **Cancel** button to exit the record without saving the changes.
- Select the **Save or Save – Add New** button to save the changes.

Export Tool or Materials Grid

- By pressing the Export button, the contents of the displayed grid can be exported to a PDF report, an Excel or .csv file.
 - Select the directory to store the file, the file name and type of file, then click **Save**
 - An Export Complete message will be displayed; press **OK**

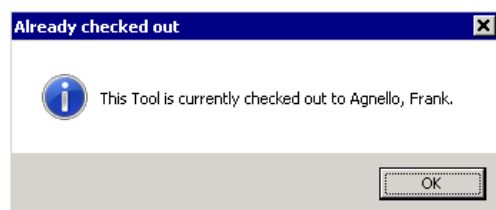
Transactions

Check-Out

Check-out items are assigned to an employee or contractor in addition to a site/location. Create Check-out transactions by selecting the **Transactions** button on the Asset Management toolbar and select the **Check-Out** tab.

Type	Tool or Item #	Qty	Description	Model No	Condition	Reference No	From Site	From Location	To Site	To Loc

- Scan or type in the **Tool or Item #** and press Enter.
 - If a Unique ID tool is selected that is already on assignment the following will display. Select the **OK** button.



- The **Description** will be displayed.

- For Unique ID tools, the **Site** and **Location**, **Condition** and **Quantity** of 1 will also be displayed.
- For Item-Quantity tools and Materials, the list of all sites and locations with their respective quantities will be displayed. Select the **From Site/Location** from which to move the items (use the filter function above the selection table to filter long lists to a particular site) and enter the **Quantity** to be moved.
- Select the **To Site** and **Location** from the selection lists.
- At the Scan field, scan or type in the employee or contractor number and press Enter. The ID number will display in the **Scan** field and the name will display in the **Assignment** field directly below. Alternatively, use the drop down list to select the **Assignment** from the Employees List Management database. The Employee ID will display in the **Scan** field.
- If Unique ID tool, optionally change the **Condition** or add a **Return Date**.
 - The **Return Date** will default to the current date. Use the drop down calendar to select a return date.
- Type additional reference information, such as requisition number, in the **Reference** field.
 - The reference information is stored in the history database, but is not shown on the History grid or standard reports. The data is available for use with custom reports.
- Click to check the **Maintain Last Values** box when entering multiple check-out items.
- Select the **Add Row** button to add the check-out item to the batch. The record will display in the lower window where all the scanned records may be viewed prior to submittal.
- Continue to add additional items to the Check Out batch.

Transaction View

File Help

Home Tools Materials Model Catalog Transactions Reports List Management Cycle Count Admin

Check-Out Check-In Transfer History

Check Out ☐ Maintain Last Values

Tool or Item #: 567

Description: Saw, Circular 8 1/4

Quantity: 1 Unique Item

Condition: Good

Return Date:

Reference No:

From Site: Warehouse 50 Location: Aisle 11- Bin 2 Qty: 1

To Site: To Loc:

Scan:

+ Add Row - Remove Row X Clear Form Submit Batch

Type	Tool or Item #	Qty	Description	Model No	Condition	Reference No	From Site	From Location	To Site	To Loc
UId	13	1	Drill, 3/4 inch	CR-9845	Good		Warehouse 50	Aisle 13, Bin 5	500, Seattle Gamewo...	None
ItemQty	3339	3	Shovel, 6.5 ft	BD-SHOV234			Warehouse 50	None	500, Seattle Gamewo...	None
Material	98339	2	Drill Bit (Set of 8)	DWD-8322			Station Warehouse	None	500, Seattle Gamewo...	None

- Select the **Clear Form** to clear the displayed check-out item on the upper panel.
- Select a line item on the lower panel and then click on the **Remove Row** button to remove any item from the batch.
- When all items have been added, select the **Submit Batch** button to submit the check-out transactions. At the prompt, select the **OK** button.

Check-In

Check-Ins will remove the assignment for Unique ID items, as well as transfer them back to their normal or home sites/locations. Create Check-In transactions by selecting the **Transactions** button on the Asset Management toolbar and select the **Check-In** tab.

Transaction View

File Help

Home Tools Materials Model Catalog **Transactions** Reports List Management Cycle Count Admin

Check-Out **Check-In** Transfer History

Check In ☐ Maintain Last Values

Tool or Item #: 3339

Description: Shovel, 6.5 ft.

Quantity: Available: 5

Condition:

Return Date:

Reference No:

From

Site: Clear

Site	Location	Qty
Narrows Bridge	None	5
Seattle Gameworks	None	3
Station Warehouse	None	5
Warehouse 50	None	7
Warehouse 50	Aisle 10	1

Scan:

To

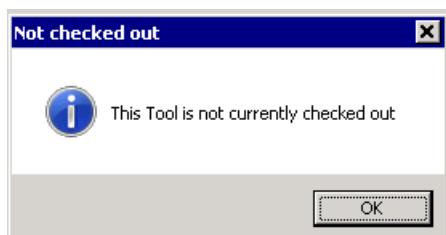
Site:

Loc:

+ Add Row - Remove Row X Clear Form Submit Batch

Type	Tool or Item #	Qty	Description	Model No	Condition	Reference No	From Site	From Location	To Site	To Loc
UId	13	1	Drill, 3/4 inch	CR-9845	Good		Seattle Gameworks	None	W51, Warehouse 51	B23

- Scan or type in the **Tool or Item #** and press Enter.
 - a. If a Unique ID tool is selected that is not on assignment the following will display. Select the **OK** button.



- The **Description** will be displayed.
- For Unique ID tools, the **From Site** and **Location**, **Condition** and **Quantity** of 1 and the current **Assignment** will also be displayed. The Home Site and Location will be auto-filled for the **To Site and Location**.
- For Item-Quantity tools and Materials, the list of all sites and locations with their respective quantities will be displayed. Select the **From Site/Location** from which to move the items (use the filter function above the selection table to filter long lists to a particular site) and enter the **Quantity** to be moved.

- Select the **To Site** and **Location** from the selection lists, or change the selection, if desired, where already auto-filled for a Unique ID tool.
- The Assignment information will already be filled in for Unique ID returns. If you want to keep a record within History of who returned Item-Quantity Tools or Materials, then fill in the employee information
 - At the Scan field, scan or type in the employee or contractor number and press Enter. The ID number will display in the **Scan** field and the name will display in the **Assignment** field directly below. Alternatively, use the drop down list to select the **Assignment** from the Employees List Management database. The Employee ID will display in the **Scan** field.
- If Unique ID tool, optionally change the **Condition**.
- Type additional reference information, such as requisition number, in the **Reference** field.
 - The reference information is stored in the history database, but is not shown on the History grid or standard reports. The data is available for use with custom reports.
- Click to check the **Maintain Last Values** box when entering multiple check-in items.
- Select the **Add Row** button to add the check-in item to the batch. The record will display in the lower window where all the scanned records may be viewed prior to submittal.
- Continue to add additional items to the Check In batch.
- Select the **Clear Form** button to clear the displayed check-in item on the upper panel.
- Select any line item on the lower panel and then select the **Remove Row** button to remove any item from the batch.
- When all items have been added, select the **Submit Batch** button to submit the check-in transactions. At the prompt, select the **OK** button.

Transfer

Transfers are moves of a tool, from one site/location to another site/location, where no assignment to an employee or contractor is being made. Transfer items by selecting the **Transactions** button on the Asset Management toolbar and select the **Transfer** tab.

Transaction View

File Help

Home Tools Materials Model Catalog **Transactions** Reports List Management Cycle Count Admin

Check-Out Check-In **Transfer** History

Transfer ☐ Maintain Last Values

Tool or Item #: 4333

Description: Monitor, 19 Inch

Quantity: 2 Available: 4

Condition:

Return Date:

Reference No:

From

Site: Clear

Site	Location	Qty
Warehouse 50	Aisle 13, Bin 5	4
Warehouse 51	None	6

To

Site: 501 Northwest Warehouse

Loc: None None

+ Add Row - Remove Row X Clear Form Submit Batch

Type	Tool or Item #	Qty	Description	Model No	Condition	Reference No	From Site	From Location	To Site	To Loc
UId	15	1	Drill, 3/4 inch	CR-9845	Good		15 interchange	None	501, Northwest Ware...	None

- Scan or type in the **Tool or Item #** and press Enter.
- The **Description** will be displayed.
- For Unique ID tools, the **From Site** and **Location**, **Condition** and **Quantity** of 1 will also be displayed.
- For Item-Quantity tools and Materials, the list of all sites and locations with their respective quantities will be displayed. Select the **From Site/Location** from which to move the items (use the filter function above the selection table to filter long lists to a particular site) and enter the **Quantity** to be moved.
- Select the **To Site** and **Location** from the selection lists.
- If Unique ID tool, optionally change the **Condition** or add a **Return Date**.
 - The **Return Date** will default to the current date. Use the drop down calendar to select a return date.
- Optionally type reference information, such as requisition number, in the **Reference** field.
 - The reference information is stored in the history database, but is not shown on the History grid or standard reports. The data is available for use with custom reports.
- Click to check the **Maintain Last Values** box when entering multiple transfer items.

- Select the **Add Row** button to add the transfer item to the batch. The record will display in the lower panel where all the scanned records may be viewed prior to submittal.
- Continue to add additional items to the Transfer batch.
- Select the **Clear Form** button to clear the displayed transfer item on the upper screen.
- Select any line item on the lower screen and then select the **Remove Row** button to remove any item from the batch.
- When all items have been added, select the **Submit Batch** button to submit the transfer transactions. At the prompt, select the **OK** button.

Material Returns from Non-stocking Sites

Materials can be returned to inventory from non-stocking sites using either the Transfer or Check In screens.

Since materials are not kept in system inventory at non-stocking sites, there will be no non-stocking sites/locations to select in the From Site/Location selection table:

The screenshot shows the 'Transaction View' window with the 'Transfer' tab selected. The 'From' section contains a table with the following data:

Site	Location	Qty
Dallas Tool Room	None	7
Northwest Warehouse	None	4
Northwest Warehouse	Aisle 1	6
Warehouse 50	None	20
Warehouse 51	Rm 21	3

- Use the Site Filter function to select the non-stocking site from which the materials are being returned:

The screenshot shows the 'Transaction View' window with the 'Transfer' tab selected. The 'From' section is now populated with the following information:

Site: 500 Seattle Gameworks

The 'To' section shows:

Site: 501 Northwest Warehouse

Loc: None None

- Enter the quantity to be returned and the To Site and Location
- Complete and submit the Transfer

- **NOTE on Average Costing:** Transferring or Checking In material from a non-stocking site will cause the material to be added into inventory at the To Site's current average cost for that material. If the material does not exist at that site, the returned material is added to inventory at \$0 cost. The average cost can be changed via adjustment.

History

Review History transactions by selecting the **Transactions** button on the Asset Management toolbar and select the **History** tab.

The screenshot shows the 'Asset History View' window. The 'Transactions' button is highlighted in the top toolbar, and the 'History' tab is selected. The 'History' section includes date pickers for 'From' and 'To' (both set to 8/23/2015), a list of checkboxes for activity types (All, Check-In, Check-Out, Transfer, Receipts, Adjustments, New Tool UUIDs, Retire/Unretire), and an 'Apply' button. To the right, there are search and filter options with radio buttons for 'Search', 'Filter', and 'Both', along with 'Apply' and 'Clear' buttons. Below these are dropdown menus for 'Sites', 'Assignment', 'Business Unit', and 'Departments'. At the bottom, a table displays transaction data with columns: Date Time, User, Activity, Tool or Item #, Quantity, Model Number, Description, Assignment, Business Unit, Department, Condition, From Site, and From.

- Use the drop down calendar to select the **History From:** date.
- Use the drop down calendar to select the **History To:** date.
- Click to select the **Check-In, Check-Out Transfer, Receipts, Adjustments, New Tool UUIDs**, and **Retire/Un-retire** box or select the **All** box.
- Select the **Apply** button to display records.

Asset History View

File Help

Home Tools Materials Model Catalog Transactions Reports List Management Cycle Count Admin

Check-Out Check-In Transfer **History**

History From: 8/22/2015 To: 8/23/2015

☒ All ☒ Receipts ☒ Check-In ☒ Adjustments ☒ Check-Out ☒ New Tool UUIDs ☒ Transfer ☒ Retire/Unretire

Search and Filters
☒ Search ☐ Filter ☐ Both
 Apply Clear

Clear

Tool or Item # Model Serial Number

Sites: Assignment: Business Unit: Departments:

View Selected Export Data

Date Time	User	Activity	Tool or Item #	Quantity	Model Number	Description	Assignment	Business Unit	Department	Condition
8/23/2015 1:18 AM	Mike, Kappa	Adjustment	123456	-2	0923475025	Microsoft Shovel 2.0				
8/23/2015 1:17 AM	Mike, Kappa	New Tool UID	324	1	DwD777	Drill, 1/2 Inch Set				Good
8/23/2015 1:17 AM	Mike, Kappa	Receipt	123456	10	0923475025	Microsoft Shovel 2.0				
8/23/2015 12:46 AM	Mike, Kappa	Check In	3432	5	Kus-342	Washer, 1/2 inch				
8/23/2015 12:46 AM	Mike, Kappa	Check In	3339	2	BD-SH0V234	Shovel, 6.5 ft.				
8/23/2015 12:46 AM	Mike, Kappa	Check In	3432	5	Kus-342	Washer, 1/2 inch				
8/23/2015 12:45 AM	Mike, Kappa	Check In	3339	2	BD-SH0V234	Shovel, 6.5 ft.				
8/23/2015 12:44 AM	Mike, Kappa	Check In	3432	2	Kus-342	Washer, 1/2 inch				
8/23/2015 12:43 AM	Mike, Kappa	Transfer	3432	2	Kus-342	Washer, 1/2 inch				
8/23/2015 12:42 AM	Mike, Kappa	Transfer	3339	2	BD-SH0V234	Shovel, 6.5 ft.				
8/23/2015 12:42 AM	Mike, Kappa	Transfer	15	1	CR-9845	Drill, 3/4 inch				Good
8/23/2015 12:42 AM	Mike, Kappa	Transfer	14	1	CR-9845	Drill, 3/4 inch		HQ	Bid Job Costs	Needs Repaired
8/23/2015 12:41 AM	Mike, Kappa	Transfer	3339	2	BD-SH0V234	Shovel, 6.5 ft.				
8/23/2015 12:41 AM	Mike, Kappa	Transfer	3339	2	BD-SH0V234	Shovel, 6.5 ft.				
8/22/2015 11:37 PM	Mike, Kappa	Check In	16	1	CR-9845	Drill, 3/4 inch	Agnello, Frank	HQ	Bid Job Costs	Good
8/22/2015 11:35 PM	Mike, Kappa	Check In	13	1	CR-9845	Drill, 3/4 inch	Anderson, Paul	NJ	Human Resources	Good
8/22/2015 10:23 PM	Mike, Kappa	Check Out	13	1	CR-9845	Drill, 3/4 inch	Anderson, Paul	NJ	Human Resources	Good

- Select any record on the lower window and click the **View Selected** button to exit the History View and go to the Tool Lookup to view or edit the record(s) for that tool or material.

Search Function

- Click to select the **Search** radio button on the upper panel.
- Use the drop down calendar to select the **History From** and **History To** dates for the search.
- Click to select the desired transaction types (**Check-In**, **Check-Out**, etc.) or select the **All** checkbox for the search.
- Use the **Tool or Item #**, **Model** or **Serial Number** search boxes to enter a specific tool/item number, model or serial number. This is an embedded string search. Press **Enter** or the **Search** icon to the right of the search box.

Date Time	User	Activity	Tool or Item #	Quantity	Model Number	Description	Assignment	Business Unit	Department	Condition	From Site
8/22/2015 11:35 PM	Mike, Kappa	Check In	13	1	CR-9845	Drill, 3/4 inch	Anderson, Paul	NJ	Human Resources	Good	Seattle Gamewor
8/22/2015 10:23 PM	Mike, Kappa	Check Out	13	1	CR-9845	Drill, 3/4 inch	Anderson, Paul	NJ	Human Resources	Good	Warehouse 50

- Select the **Clear** button to clear the search criteria and display all the records.

Filter Function

- Click the radio button to select the **Filter** feature on the upper panel to filter records by Site, Assignment, or Business/Department.
- Use the drop down calendar to select the **History From:** and **History To:** dates for the search.
- Click to select the desired transaction types (**Check-In**, **Check-Out**, etc.) or select the **All** checkbox for the search.
- Use the drop down list to select and filter by **Sites** from the Sites List Management database.
- Use the drop down list to select and filter by **Assignment** from the Employee List Management database.
- Use the drop down list to select and filter by **Business Unit** from the Business Units List Management database. Note that Business Unit is a filter for Department – a Business Unit search without Department is not possible.
- Use the drop down list to select and filter by **Departments** from the Departments List Management database.
- Select the **Apply** button to apply the filter and display the records.
- Select the **Clear** button to clear the filter criteria.

Asset History View

File Help

Home Tools Materials Model Catalog Transactions Reports List Management Cycle Count Admin

Check-Out Check-In Transfer History

History From: 8/22/2015 To: 8/23/2015

☒ All
☒ Check-In
☒ Check-Out
☒ Transfer

☒ Receipts
☒ Adjustments
☒ New Tool UUIDs
☒ Retire/Unretire

Apply

Search and Filters

☐ Search
☒ Filter
☐ Both

Apply Clear

Clear

Tool or Item # Model Serial Number

Sites: Assignment: Business Unit: Departments:

View Selected Export Data

Date Time	User	Activity	Tool or Item #	Quantity	Model Number	Description	Assignment	Business Unit	Department	Condition	From Site
8/22/2015 11:35 PM	Mike, Kappa	Check In	13	1	CR-9845	Drill, 3/4 inch	Anderson, Paul	NJ	Human Resources	Good	Seattle Gamewor
8/22/2015 10:23 PM	Mike, Kappa	Check Out	13	1	CR-9845	Drill, 3/4 inch	Anderson, Paul	NJ	Human Resources	Good	Warehouse 50
8/22/2015 10:23 PM	Mike, Kappa	Check Out	3339	3	BD-SH0V234	Shovel, 6.5 ft.	Anderson, Paul				Warehouse 50
8/22/2015 10:23 PM	Mike, Kappa	Check Out	98339	2	DwD-8322	Drill Bit (Set of 8)	Anderson, Paul				Station Warehouse

Search and Filter Function

Search and Filter can work together

- Select Search and Filters by clicking the **Both** radio button on the upper panel. Select the search and filter criteria and click Apply

Asset History View

File Help

Home Tools Materials Model Catalog Transactions Reports List Management Cycle Count Admin

Check-Out Check-In Transfer History

History From: 8/22/2015 To: 8/23/2015

☒ All
☒ Check-In
☒ Check-Out
☒ Transfer

☒ Receipts
☒ Adjustments
☒ New Tool UUIDs
☒ Retire/Unretire

Apply

Search and Filters

☐ Search
☐ Filter
☒ Both

Apply Clear

Clear

3339 Model Serial Number

Sites: Warehouse 50 Assignment: Business Unit: Departments:

View Selected Export Data

Date Time	User	Activity	Tool or Item #	Quantity	Model Number	Description	Assignment	Business Unit	Department	Condition	From Site	Fr Lc
8/22/2015 10:23 PM	Mike, Kappa	Check Out	3339	3	BD-SH0V234	Shovel, 6.5 ft.	Anderson, Paul				Warehouse 50	No

Export History Grid

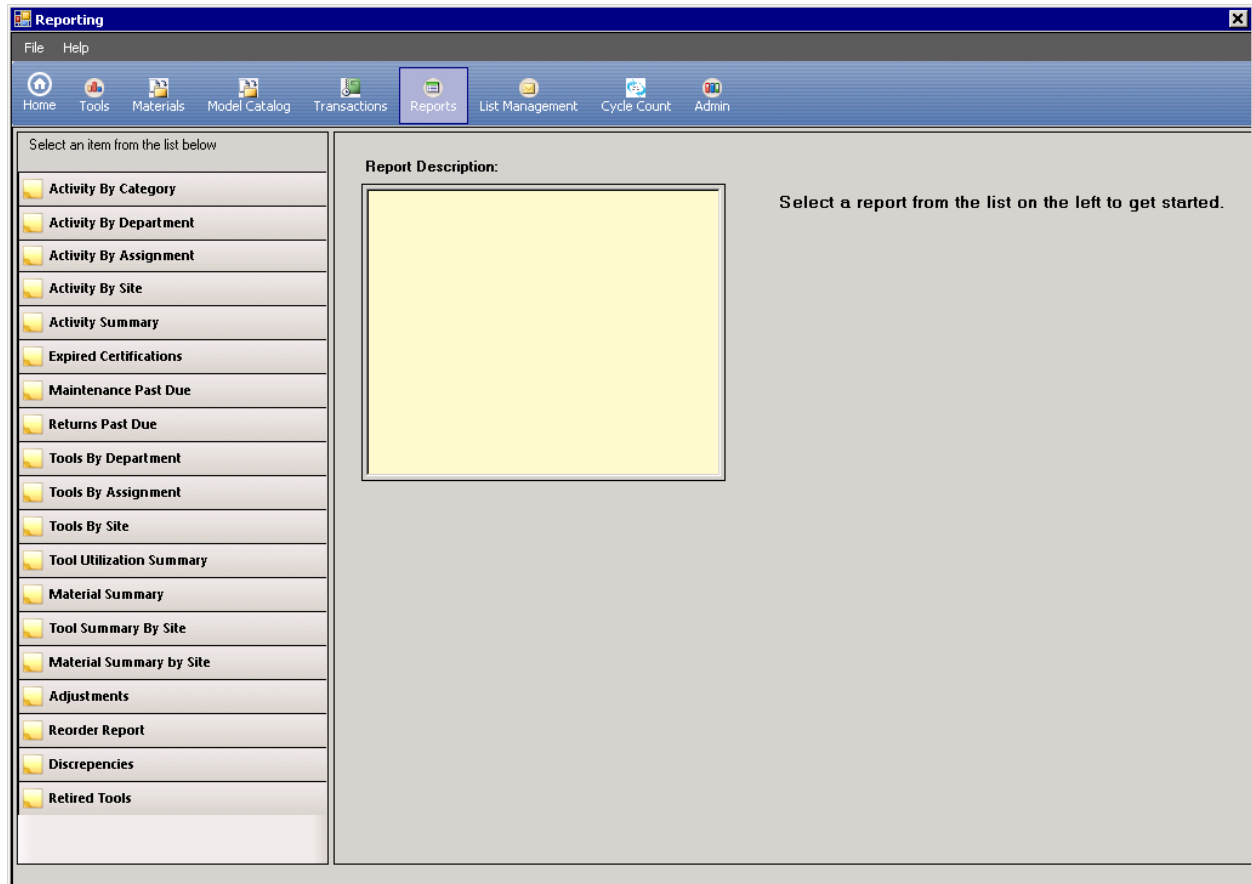
- By pressing the Export button, the contents of the displayed grid can be exported to a PDF report, an Excel or .csv file.
 - Select the directory to store the file, the file name and type of file, then click **Save**
 - An Export Complete message will be displayed; press **OK**

Cycle Count

The Cycle Count functionality requires PowerTrack mobile software for connection to mobile devices. Please refer to the ***Using PowerTrack Mobile Devices with Asset Management*** addendum to this document for a full explanation of Cycle Count.

Reports

View and print reports by selecting the ***Reports*** button on the Asset Management toolbar.



Activity Reports

Activity reports show tool and material activity for a selected date range. These reports include:

- Activity By Category
- Activity By Department
- Activity By Assignment
- Activity By Site
- Activity Summary

- Adjustment
- Discrepancies
- Retired Tools

These reports require the user to enter a Date Range, and make other selections depending on the Report Type.

- Select the **View Report** button to view the report.
- Select the **Print Icon** to print the report.

Example Report – Activity by Category (no Category selected will cause all categories to show on the report):

Date	Tool	Activity	Qty	Assignment	From Site/Location	To Site/Location
Category - Drills, Hand						
Drill, 1/2 inch Set DWD777						
08/05/15	102	Transfer	1		Warehouse 51, Bin 22	Tacoma Library, None
08/13/15	102X	Transfer	1		Warehouse 51, Bin 22	Tacoma Library, None
08/17/15	101	Check Out	1	Deutsch, Amy 1	Warehouse 51, Bin 23	Tacoma Library, None
08/17/15	101	Check In	1		Tacoma Library, None	Station Warehouse, None
08/17/15	101	Check Out	1	Lewis, Alton 1	Station Warehouse, None	Warehouse 50, Aisle 13, Bin 5
08/17/15	101	Check Out	1	Naso, Anthony 1	Warehouse 50, Aisle 13, Bin 5	Tacoma Library, None
08/17/15	353	Check In	1		Warehouse 50, Aisle 11- Bin 2	Warehouse 51, None
08/18/15	101	Check In	1		Tacoma Library, None	HQ Office, Computer Room
08/18/15	101	Transfer	1		HQ Office, Computer Room	Station Warehouse, None
08/18/15	102X	Transfer	1		Tacoma Library, None	Warehouse 51, Bin 21
08/18/15	101	Check Out	1	Lewis, Alton 1	Station Warehouse, None	Tacoma Library, None
08/18/15	102	Transfer	1		Tacoma Library, None	I5 interchange, None
08/18/15	101	Check In	1	Lewis, Alton 1	Tacoma Library, None	Warehouse 51, Bin 21
08/21/15	68532	New Tool UI	1			I5 interchange, None
08/23/15	324	New Tool UI	1			I5 interchange, None
Drill, 1/2 inch DWDU001						
08/21/15	98	Retire	1			
08/21/15	98	Retire	1			
08/21/15	98	Un-Retire	1			Northwest Warehouse, Aisle 1
08/21/15	98	Retire	1			
Drill, 3/4 inch Rig987						
08/21/15	98323	New Tool UI	1			Northwest Warehouse, Aisle 2
Drill, 3/4 inch CR 9845						
08/17/15	12	Check Out	1	Deutsch, Amy 1	Warehouse 51, Bin 23	Tacoma Library, None

Tool Inventory Reports

Tool Inventory reports show the current tool inventories. These reports include:

Inventory at the Unique ID level:

- Tools By Department
- Tools By Assignment

- Tools By Site

Inventory at the Model level:

- Tool Utilization Summary
- Tool Summary By Site

Example Report: Tool Summary by Site:

Tool Summary by Site					8/23/2015
Category	Description	Model	Manufacturer	Quantity	
Site ID 1 - TEST Site					
Air Card	Air Card - Item Qty	D44545489	Belkin	3	
Keyboard	Keyboard	3335888	Craftsman	45	
Printer - Cards	a great card	CBN-0000	Zebra	10	
Shovel	Microsoft Shovel 2.0	0923475025	Microsoft	23	
Site ID 45 - A main stocking place					
Drills, Hand	Drill, 1/2 Inch Set	DWD777	Dewalt	2	
Mouse	3-button mouse	3T095	Apple	9	
Phone	Phone, Conference	EMC-34	EMC	10	
Site ID 46 - Great job site					
Air Card	Air Card - Item Qty	D44545489	Belkin	6	
Drills, Hand	Drill, 1/2 Inch Set	DWD777	Dewalt	1	
Drills, Hand	Drill, 3/4 inch	CR-9845	Craftsman	1	
Keyboard	Keyboard	3335888	Craftsman	2	
Site ID 47S - A secondary stocking place					
Digital Camera	Laptop Extended Digital Camera	LifeCam	Apple	1	
Drills, Hand	Drill, 1/2 inch	DWD200B	Dewalt	10	
Keyboard	Keyboard, 32 key	AP-3432	Apple	20	
Site ID W51 - Warehouse 51					
Air Card	Air Card - 4G Verizon	89798799	Belkin	1	
Air Card	Air Card - Item Qty	D44545489	Belkin	39	
Drills, Hand	Drill, 1/2 inch	D-1000	Craftsman	1	
Drills, Hand	Drill, 1/2 Inch Set	DWD777	Dewalt	3	
Drills, Hand	Drill, 3/4 inch	CR-9845	Craftsman	2	
Keyboard	Keyboard	3335888	Craftsman	45	
Keyboard	Keyboard, 32 key	AP-3432	Apple	5	
Laptops	iMac, 12 inch	Model 3431	Apple	1	
Monitor	Monitor, 19 inch	D3432	Dell Inc	6	

Material Inventory Reports

Material inventory reports show the current material inventories. These reports include:

- Material Summary
- Material Summary By Site

Example Report: Material Summary

Material Summary

8/23/2015

Description	Model	Manufacturer	Total Quantity
Category: Bolts			
Bolt, 1/8th inch	99999	HP	158
Bolt 1/2 inch	S123-456	Tacoma Screw	136
Bolt, 3/4 Coarse 5"	TS66-335	Tacoma Screw	110
Total of Bolts			404
Category: Drill Bits			
Drill Bit Set (8)	BD-4435	Black & Decker	105
Drill Bit (Set of 8)	DWD-8322	Dewalt	41
Total of Drill Bits			146
Category: Machine Screws			
Screw, 3/4 inch	BD-3432	Black & Decker	314
Machine Screws 3/4 inch	K343	Kushlan	30
Screw, 3/4"	TS-343	Tacoma Screw	112
Total of Machine Screws			456
Category: Nuts			
Nut, 1/4" Torque Locking	1767	Craftsman	53
Nut, 3/4"	985-1	Ames	160
Total of Nuts			213

Past Due Reports

Past Due reports show the events that are overdue. These reports include:

- Expired Certifications
- Maintenance Past Due
- Returns Past Due

Example Report: Maintenance Past Due

Tool Maintenance Past Due

8/23/2015

Tools that are due for maintenance on or before August 23, 2015

Tool	Description	Model	Condition	Maintenance Due Date	Scheduled Return Date	Assignment
Site ID -						
941	Cement Mixer, 50 Gal	CM65454	Good	08/21/2015		
Site ID - Count: 1						
Site ID W49 - Building 49 Facility						
608	iPad2 11	iPad2 32g 3G Verizon	Good	04/29/2015		
19	Drill, 3/4 inch	CR-9845	Good	07/20/2015		
Site ID W49 - Building 49 Facility Count: 2						
Site ID 300 - Dallas Tool Room						
76	Generator, 3/4 Hp	C5044	Used	03/25/2015		
79	Drill, 1/2 Inch Set	DWD777	Test	04/24/2015		
Site ID 300 - Dallas Tool Room Count: 2						

About

The About page displays the software version number. To access the About page, click the **Help** button and select **About**. Click the Close button  to exit the About screen

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